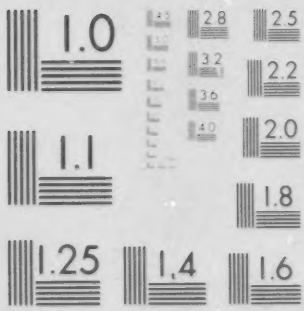

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ABSTRACT

To become a capable and successful board member, an individual must be willing to devote many hours to serving as a school trustee--attending board meetings, school functions, conferences, and workshops, and thoroughly studying issues and problems demanding decisions. This manual gives a comprehensive account of these areas of board responsibility and the specific "how to's" of procedure. This issue, which incorporates the significant points of the previous editions, has been aimed at updating information of importance to board members as well as at clarifying the role of today's board member. It is hoped that this manual will give the new board member a mini-course in California public school boardsmanship and will refresh and update the knowledge of board members who have already served for a period of time. (Author)

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A Guide for the School Board Member

3

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Preface

To become a capable and successful board member, an individual must be willing to devote many hours to serving as a school trustee — attending board meetings, school functions, conferences, workshops and studying thoroughly issues and problems demanding decisions. This manual gives a comprehensive account of these areas of board responsibility and the specific "how to's" of procedure.

Any manual can be expanded, revised and updated as the years pass. The first Boardsmanship was prepared by Stanford University with the assistance of a team of educators. Boardsmanship has been reprinted with minor revisions several times since 1955. This 1975 issue of Boardsmanship, which incorporates the significant points of the previous editions, has been aimed at updating information of importance to board members as well as clarifying the role of today's board member participating in the educational scene.

Time to think is crucial in order for board members to take the initiative in formulating educational programs which will meet the needs of the students in their districts. It is paramount that board members not place themselves in the position of having to react to situations and issues but rather to devote adequate time in preparatory study in order to prevent crises.

It is hoped that this manual will give the new board member a mini-course in California public school boardsmanship and will refresh and update the knowledge of board members who have already served for a period of time. In order for this book to be useful, it must fulfill the needs of individual board members. If it is read for inspiration, for information, for guidance or for reminders in meeting legal requirements, it will have met its objective.

Acknowledgements

Any guide must have input from persons knowledgeable in the field about which the guide provides information. The 1975 California Boardsmanship acknowledges input from Jane Legate, former California school board member, from members of various CSBA committees, from members of CSBA staff and from the publications of the Montana, Wyoming and Michigan School Boards Associations.

The San Diego County Department of Education was most helpful as well as the business office of the Escondido Union (elementary) School District in clarifying certain legal points.

Special acknowledgement goes to Vivian N. Doering, member of CSBA's Board Development and Management Committee, who undertook the monstrous task of assimilating and rewriting the information for this updating of Boardsmanship, and to Richard Montgomery and Ginny Wedra, CSBA staff, who edited it.

The information in this manual is as current as possible and as comprehensive as possible in one volume designed to cover the spectrum of board members responsibilities. When a topic is not explored fully in detail, reference is made to a supplemental explanatory publication by CSBA. A list of such supplemental publications is appended.

If any pertinent information should be included that has not been, please inform CSBA in order that a record might be kept for further insertions of material into Boardsmanship.

Code of Ethics

A code of ethics is an expression of those personal ideals which should guide an individual's daily activities.

In all my actions as a School Board Member, my first commitment is to the well-being of our youth. My primary responsibility is to each child, — regardless of race, creed, color, sex, or national origin.

I also have other major commitments to:

- The Community. I am responsible to all citizens of the district and not solely to those who elected me; nor to any organization of which I may be a member.
- Individuals. I have a direct concern for every individual in the community. As an integral part of my duties, I represent the authority and responsibility of government. This represents the delegated authority of the majority and must be exercised with as much care and concern for the least influential as for the most influential member of the community.
- Employees. The district is a major employer of the community. My actions as a board member may affect the capability of district employees to practice their trade or profession.
- Laws, Policies. I must be aware of, and comply with, the constitutions of State and Nation, the Education Code of the State of California, other laws pertaining to public education, and the established policies of the district.
- Decision Making. It is my obligation, under the law, to participate in decisions pertaining to education in the district. As an elected representative of the people, I can neither relinquish nor delegate this responsibility to any other individual or group.
- Individual Feelings and Philosophy. Like every other individual, I have something to contribute to society.

Understanding and acting the foregoing premises, I shall:

- consider my position as a board member as a public trust and not use it for private advantage or personal gain.
- be constantly aware that I have no legal authority except when I am acting as a member of the board. I shall present my concerns and concepts through the process of board debate and, if in the minority on any decision, I shall abide by and support the majority decision. When I am in the majority, I shall respect divergent opinions.
- encourage ideas and opinions from the citizens of the district and endeavor to incorporate their views in the deliberations and decisions of the board.

- devote sufficient time, thought, and study to proposed actions to be able to base my decisions upon all available facts and vote my honest convictions unswayed by partisan bias of any kind.
- remember that the basic functions of the board are to establish the policies by which the schools of the district are to be administered and to select the superintendent and staff who will implement those policies.
- promote and participate actively in a concerted program of timely exchange of information with all citizens, parents, employees and students of the district.
- recognize that the deliberations of the board in executive session are not mine to release or discuss. They may be released or discussed in public only with the approval of the board.
- avail myself of opportunities for enlargement of my potential as a board member through participation in educational conferences, workshops, and training sessions made available by local, state, and national agencies.

1

Meeting the Challenge of Public Service

Congratulations! You have been elected to serve on your local school board. You are a member of a select group of people, chosen by the citizens of your community to perform a vital task. You have been granted a position of "trusteeship" over the public schools. You have been given the privilege and opportunity to serve the public in one of the most important offices in our society. You have an obligation to fulfill this trust to the best of your ability.

The Root of Your Responsibility

According to the 10th amendment to the Constitution of the United States and the Education Code of California, every person has the right to free and equal educational opportunities. And according to the American tradition, specifically in Article IX, Sections 1 and 5 of the California Education Code, it is the duty and right of those locally in control to see that every person receives his constitutional right of free and equal education. You are now a member of that team which is locally in control. You have been entrusted with the power and authority to make decisions which will crucially affect the lives of many people — now and for years to come.

Board Membership as a Personal Experience

Serving on a board is definitely time and energy consuming. And, as is the case in many efforts that are worthwhile, "no one is in it for the money." In years past, such service was without compensation; however, recent legislation has permitted board members the option of voting a stipend for attending board meetings.

The experience of serving may be frustrating, disillusioning, and trying as you encounter the many controversies surrounding education and the demands that accompany public office.

But this can be one of the most rewarding and educational experiences you will ever have. You will learn everything you always wanted to know and more about educational mandates, methods of instruction and school finance. And when you see students benefiting from programs and practices that have cost you "blood, sweat, and tears", you will have your real reward.

The Roles You Have Accepted

You and your board are managers at the local level of one of the biggest businesses in California. More than one-third of all expenditures and more than one-half of all government staffing at the state and local level in the United States is devoted to education. In many communities the schools are the largest single employer, operate the largest budget, manage the greatest capital investment and account for the largest portion of levied taxes. The schools also have the most direct contact with the public and affect more people than any other enterprise, public or private.

As a manager you must wear many different hats:

As a trustee, you have been charged with seeing that the schools are well managed, tax dollars are wisely spent, and the investment and interests of the public are protected.

As an employer, you are obligated to assure fair and equitable practices for all employees, seek their professional advice and judgment, support and provide for their needs, and promote good relationships and a healthy morale among the staff.

As an educational policy-maker, you have a moral commitment to provide the best possible learning experiences for all students, to meet the unique and separate needs of the individual, and to recognize and protect the rights and responsibilities of these young citizens.

As an elected official, you have several responsibilities:

a. You must assess the attitudes of the public, whom you represent, therefore you must be accessible at public meetings and functions.

b. You must base your decisions on the needs of *all* the people; Problems cannot be decided on the basis of geographic divisions, sectional interests, the demands of special interest or ethnic groups, sexual discrimination, or for political expediency.

c. You must serve the public and your board by being willing to be a spokesperson for the schools discussing school affairs frequently and intelligently. The people of your school district regard you as "the Board of Education" 24 hours a day, away from meetings as well as during meetings. Your telephone will resound with their educational hopes and frustrations.

Immediate Actions You Can Take to Learn Your New Job

Because there is almost an overwhelming amount to learn, "on the job training", holds the key to effectiveness. Learning to be a good board member is a continuous process; you will gradually become more familiar with laws, with sources of assistance, and you will get more effective at problem-solving and decision-making. But there are certain actions, other than reading this manual, you can do now to inform yourself:

1. With the permission of your future board, you should attend any board meetings (if any are scheduled) between the time you are elected and the time your term begins.

2. You should get copies of minutes of the last few meetings, annual reports, school budgets and surveys.

3. You should make tours of the school buildings in the district to familiarize yourself with the administration, the teaching and classified staffs, and school plants. You could ask to visit classes of varying grade and ability levels to get a sense of the different needs and student/teacher relationships found in the classroom.

4. Attend some of the workshops and training sessions provided by CSBA, your County Office of Education, and others.

5. Request help, if needed, from CSBA field staff, your superintendent, the County Office of Education, or others.

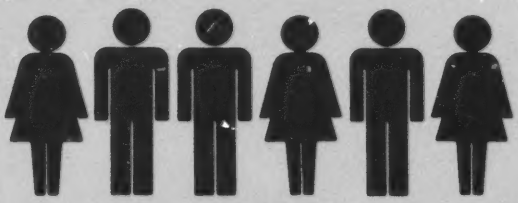
6. For future reference, carefully survey the list of documents appended to this manual that CSBA publishes on specific problems.

7. Then in your spare time (tongue-in-cheek), you can request an extensive bibliography from three sources other than CSBA:

   The U.S. Office of Education
   400 Maryland Ave., S.W.
   Washington, D.C. 20202

National School Boards Association
1233 Central Street
Evanston, Illinois

California State Department of Education
721 Capitol Mall
Sacramento, CA 95814



You Are A Member of a Team

John Donne's poetic phrasing "No man is an island" could aptly be altered for our context to "No person is a Board." It cannot be over-emphasized that your board must work as a team. Any action by the board should be taken only after proposals have been thoroughly considered by all, and a group decision has been made.

School board meetings provide a forum for discussion and serious deliberation. Discussion at these meetings must represent the best thinking of the group. Decisions should be the result of input from all. Each board member has unique interests, talents and backgrounds and has therefore a unique contribution to make.

But since each speaks from different experiences, differences of opinion may arise. Respect these viewpoints, realizing they result from the perceptions of varying backgrounds. Meetings should not be allowed to deteriorate into heated debates, or personal attacks. It is wise to adopt a policy governing conduct at board meetings, as some boards have done. Strive to solve problems in a spirit of harmony and cooperation in spite of the differences. Base your decision on your own conviction after viewing all the facts, and then abide by and uphold the final majority decision of the board.

Note that an individual board member has no legal authority except during an official board meeting. California has been very specific in delegating control to the board as a whole, and not to individuals. Outside of official meetings a board member has no authority over school policies or employees, and no individual may commit the group.

Goals for Personal Growth and More Effective Boards

You may see the necessity for some changes in your own attitude, approach and behavior as you become more aware of what it takes to have a board that is really effective. Being a board member is almost always a growth experience. Here are some do's and don't's other members have become aware of.

For Board Unity

- Subordinate personal interests
- Accept and support majority decision of the board
- Identify self with board policies and actions
- Suspend judgment until the facts are available
- Be willing to accept ideas from others

For Leadership

- Improve your ability to speak effectively in public
- Make use of pertinent experience
- Be willing to take sides in controversies
- Work tactfully with groups and individuals
- Be willing to take responsibility when necessary to identify problems and determine solutions

For Executive Function

- Understand the necessity of delegating administrative responsibilities to your superintendent.
- Encourage teamwork between the superintendent and the board.

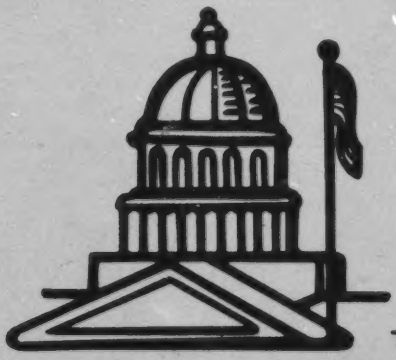
Often, a glance at this list before a board meeting will help you make the psychological transition that is sometimes necessary from being an individual to being a member of a team.

Your challenge as a board member is great, and for those who believe in the significance of education to the individual and to society, meeting the challenge will bring immeasurable rewards.

2

Exercising Authority Through Legal Mandates

The educational system in America is unique among the nations of the world. In most countries education is national in scope and control, governed by professional educators or federal officials. But in the United States, education is primarily a function and responsibility of each of the individual states and has 50 separate and distinct state school systems.



The Legislature

In California, more than in any other state, the educational system is governed by legislative policy enunciated in very specific detail in the Education Code. The California legislature has developed into one of the strongest in the nation, largely self-sufficient and independent of executive branch domination. It views itself with some justification as the programmatic, innovative branch of government.

The Governor

Besides having a general veto right over all bills, it is in the budgetary arena

that the Governor exercises much power and authority. For the last half-century, California has had an "executive budget" which allows the Governor, and, in turn, the Department of Finance, to carefully control the operation of state government. An important power of the governor over education is the "line item veto" which exposes component parts of larger appropriations to the blue pencil.

The State Constitution

The Constitution of the State of California charges the legislature with the obligation of providing a program of free public education, but the concept of local responsibility and support is implicit. In Article IX, Sections 1 and 5, can be found the charge: "A general diffusion of knowledge and intelligence being essential to the preservation of the rights and liberties of the people, the Legislature shall encourage by suitable means the promotion of intellectual, scientific, moral and agricultural improvement . . . The Legislature shall provide for a system of common schools by which a free school shall be kept up and supported in each district."

To carry out this mandate, school districts numbering more than 1,000 in the state have been established to serve specified geographical areas, with the citizens within those communities retaining jurisdiction and direction over their schools through elected representatives on local governing boards.

School boards, therefore, exist as an extension of the legislature to oversee the governing of the public schools at the local level. When you are elected to membership on the board of education of a school district, you not only serve as a representative of the citizens in your community but also as an official agent of the state, discharging a state responsibility, sworn to uphold the state laws on education.

The Education Code

The scope of your legal responsibility and authority is determined by the legislature and specified in various statutes relating to education. These statutes are compiled in the Education Code.

Permissive Code

California historically has operated under a mandatory Education Code rather than a permissive one, meaning that the decisions of the local board of education and the operation of school districts were confined to those limitations and mandates specifically stated in statutes. However, with the passage of AB 27 this principle has changed. Section 7503 of the Education Code reads:

> The governing board of any school district, including the governing board of any community college district, may initiate and carry on any educational program as defined in Section 7552 which is not in conflict

> with law and which is not in conflict with the purposes for which school districts are established.
>
> This section shall remain in effect until January 1, 1976, and on that date is repealed.

And the Code continues with Section 2., 7503.5 stating,

> On and after January 1, 1976, the governing board of any school district, including the governing board of any community college district, may initiate and carry on any program, activity, or may otherwise act in any manner which is not in conflict with or inconsistent with, or preempted by, any law and which is not in conflict with the purposes for which school districts are established.

Education Code Index

Each year several thousand education bills are introduced in the legislature. Each year, as several hundred of those bills become law, the Education Code is expanded to a cumbersome collection of laws stretching to several volumes. CSBA and the Association of California School Administrators participate jointly in publishing an Education Code Analysis and Index. In addition to its use as a legal reference, this publication is an excellent study guide for those legal requirements specifically affecting boards of education and their superintendents.

Title 5 Administrative Regulations

In addition to the Education Code, direction is also given to the local school districts by policies adopted by the State Board of Education which are contained in Title 5 of the Administrative Code. These include specific requirements which must be fulfilled at the local level.

While board members are not expected to learn all of the statutes and regulations governing the schools, you should become familiar with the Education Code and Title 5 Administrative Regulations. Experience helps a board member to become familiar with many of the legal demands. The superintendent and his/her administrative staff are expected to know and to follow the legal requirements, keep the board informed, and make appropriate recommendations to the board for action. However, there will be numerous occasions when it will be necessary or advisable to seek legal counsel for interpretation and advice on the application of the law to your specific local problem.

Other Sources of Authority

There are a number of other governmental agents and agencies which having been delegated rule-making powers by the legislature, have a direct relationship with the local school district. Among these are:

State Department of Education
State Department of Finance
Division of Architecture, Department of General Services
County Superintendent of Schools
County Counsel
County Board of Supervisors
Department of Transportation
California Highway Patrol
City Council (in cases of Charter City districts)
Attorney General and the Courts

Other statutes affecting the public schools may be found in:

Government Code
Penal Code
Motor Vehicle Code
Health and Safety Code
Labor Code
Welfare and Institutions Code

The powers actually granted or implied in acts passed by the legislature are broad and provide freedom for boards to plan educational programs tailored to the needs and resources of the community. When board decisions are challenged, the courts generally affirm the discretionary powers, unless there is strong evidence that a policy has been unusually arbitrary or unreasonable.

The Federal Government

In the words of the Tenth Amendment to the United States Constitution, the responsibility for public education is given "to the States and to the people." Given this democratic trust each state has made its own provisions for education. For the greater part of American history, the federal government has assumed very little responsibility in the field of education. However, because of great population mobility and the mass educational needs of modern society, the federal government has increased its role in the educational system of the nation.

With the advent of the Elementary and Secondary Education Act (ESEA) passed by Congress several years ago, the federal government has claimed a piece of the action in the educational field by financially subsidizing such programs as Headstart, Bilingual Instruction, Compensatory Education, and Library funding.

3

The Structure of California's Public School System

The Public School System in California, a system of common schools, free and accessible to all, is technically defined as those grades from Kindergarten through 14. Actually, the educational programs provided by the public schools cover a lifetime, spanning preschool age through adult years. The operation of the community colleges and their boards of trustees is separate and independent from that of the public schools conducting the K-12 program and is discussed in Chapter XI.

The state legislature has delegated the educational responsibility of the public schools, K-12, to three major policy-making bodies: State Board of Education, County Board of Education and the Local Board of Education. All three levels of responsibility are important; each has a distinct function and contribution.

State Board of Education

The State Board of Education is composed of ten members appointed by the Governor with the advice and consent of two-thirds of the Senate as outlined in Education Code, Section 101. The term of a state board member is four years.

The function of the state board is to establish statewide policies for the operation of the public schools as necessary to comply with the mandates of the law. The board has the following responsibilities:

1. to interpret statutes and adopt rules and regulations to implement those laws
2. to provide guidelines to assist local districts in carrying out their responsibilities
3. to evaluate the operation of school districts and educational programs
4. to determine the appropriation of certain funds received from state or federal allocations
5. to set standards to be met by pupils or school personnel

6. to determine curricula and instructional materials to be used
7. to designate the organization of school districts in the state
8. And to give direction to the State Department of Education through the State Superintendent of Public Instruction.

State Superintendent of Public Instruction

The State Superintendent of Public Instruction is elected by the voters of the state at a general election held in November to a four year term. He/she serves as the administrative officer to the State Board of Education and is director of the Department of Education. It is a nonpartisan position and does not require any specific qualifications. Anyone who is a resident of the state and over the age of 18 may seek election.

The state superintendent, as a constitutional officer and elected by the people, retains a great deal of personal authority independent of the State Board; nevertheless, good management practice dictates that as the chief executive officer of the board she/he fulfills her/his administrative responsibilities to them.

State Department of Education

The State Department of Education is the governmental agency responsible for administering the operation of the public schools at the state level. It is located in Sacramento and its employees are responsible to the Superintendent of Public Instruction. The Department provides a wide variety of functions and services, covering all phases of school district operation. The Department collects data, disseminates information, approves and supervises special programs, evaluates the fiscal and educational management in the school districts, develops state guidelines, conducts education programs to train school district personnel and generally advises and assists the local districts in carrying out their functions.

County Office of Education

Each of the 58 counties in the state has a county office of education, commonly known as the County Superintendent of Schools Office. Each county office has a County Board of Education and a County Superintendent of Schools.

The office is administered by the County Superintendent of Schools, who is usually elected on a county-wide basis. Financial support is generally received from three sources: (1) the County General Fund — taxes levied by the Board of Supervisors on the basis of a budget approved by the County Board of Education for general and business accounting services and the operation of certain special schools (except fiscally independent county boards); (2) the County Schools Service Fund and state apportionments, for exceptional children in special schools on an ADA basis, for certain direct services to small school districts and coordination of instructional services for all districts; and (3) contracts with local school districts for special services.

Services of the County Office of Education

The services available from the county office of education are many and varied. Generally they fall into five categories: (1) direct services to small school districts; (2) financial services; (3) liaison and coordination services; (4) direct instructional programs; (5) contract services.

1. Direct Services. The relationship of local districts to the county superintendent of schools office varies according to the size and type of school district and the extent of the services offered and accepted. Elementary districts of less than 901 ADA, high school districts of less than 301 ADA, and unified districts of less than 1,501 ADA receive certain direct services from the county office, such as the supervision of attendance, supervision of instruction, bookkeeping services, preparation of payroll, preparation of school district budget, health services, and pupil personnel and guidance services. These services are financed in part by a portion of state aid to these districts which is allocated to the county office. Similar services may be planned or contracted for by larger school districts.
2. Financial Services. The county office is required to be involved in various aspects of all school districts financial operations including the calculation of revenue limits, approval of district budgets, audit of district expenditures, and the monitoring of every district's financial condition.
3. Liaison and Coordination Services. The superintendent of schools office performs the following functions for all school districts in the county:
   a. Acts as a liaison between local districts and the State Department of Education by collecting and forwarding all reports required by the State Department of Education and maintaining a register of credentials for all teachers employed by the county.

b. Other services are coordination of courses of study, guidance services, health services, school library services, special education and attendance activities.

4. Direct Instructional Programs. In certain areas of the instructional program the county office of education can have direct responsibility for educating students within the county. Generally these are in the area of some type of special educational program. Examples of this type of program are instruction of physically handicapped, educationally handicapped, and mentally retarded. Other direct programs include outdoor science conservation and forestry, vocation education (regional occupational centers), juvenile institutions, early childhood education, and county school library services.

5. Contract Services. School districts within a county may contract for many of the services provided for by the county office of education. Most of the services listed under (3) are available to a school district on a contract basis. In some counties data processing, television, and audio-visual services are also available.

The County Board of Education

The county board of education is composed of five or seven members who, with a few exceptions, are elected by trustee areas except in chartered counties whose charters provide for general elections.

County board members must have the same qualifications as district board members for serving on the board and should represent the interests of the entire county rather than special interest groups or a given geographical area. Upon election, they too should learn their job through a formal plan of induction similar to the one outlined for district board members and should keep themselves informed about issues in public education.

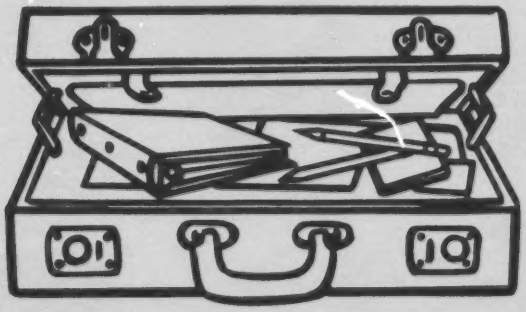
The organization of the county board of education is similar to that of district boards. All meetings must have a majority of board members present to conduct official business. Except for the discussion of matters allowed in the Brown Act, all meetings must be open to the public. Special meetings require written notice similar to that required for special meetings of district boards. The need for an agenda and adequate board minutes, as outlined in the section of this chapter for local boards, applies to county boards of education as well.

The relationship between county boards of education and the county superintendent of schools differs from the relationship between a district board and its superintendent, since in most instances the county superintendent is elected, not appointed by the county board. It is apparent, however, that good practice dictates that the effectiveness of the county unit will increase in direct proportion to the degree to which harmonious relationships exist between the county board and

the county superintendent. Their relationship should be similar to that recommended for district governing boards and superintendents.

Primary Functions of the County Board of Education

The county board of education has two primary functions: 1. To act as a policy making body for the county office, and 2. To adopt the annual budget. The Education Code provides many other duties and responsibilities for the county board of education, some of which are as follows: (1) adopt rules and regulations governing the administration of the office of the county superintendent of schools; (2) hold hearings and make final decisions of the expulsion of pupils if a district decision is appealed; (3) hold hearings and make final decisions on interdistrict attendance disputes if the dispute is appealed to the county board; (4) selection and approval of films and filmstrips before they are acquired for distribution to school districts; (5) approve annually a standard list of school supplies for the county; (6) approve the county superintendent's cooperating with school districts in the development of courses of study; (7) may adopt a list of books for supplementary use in elementary districts within the county; (8) approve the employment by the county superintendent of schools of qualified personnel to provide for coordination of courses of study, guidance changes, health services and other special activities.



County Superintendent of Schools

The county superintendent of schools is elected, usually for a four-year term. She/he is the executive officer of the county superintendent of schools Office. She/he is required by law to:

1. Serve as secretary to the county board of education and the county committee on school district organization.
2. Make recommendations to the county board of supervisors regarding petitions for school district boundary changes made directly to the county superintendent's office, rather than to the county committee on school district organization.

3. Call an annual meeting of representatives of the school boards of the county for the purpose of filling positions opened by expired terms of members of the county committee on school district organization.

County Office Boundaries

A primary function of the county office of education is to act as the intermediate unit between the State Department of Education and local school districts. The state legislature, the governor's office and many persons within education in California have questioned the present structure of the county office of education along existing county boundary lines. Several statewide studies have been conducted on this subject over the past few years and most of them have concluded that due to such changes as better transportation, better communications, and the changing needs of students, the county office of education probably should have boundaries based on the educational needs of the students to be served and not necessarily on existing county lines.

In the future it is possible that a smaller number of larger intermediate units will evolve. Currently, through joint powers agreements, two or more county offices of education have joined together to perform services of various types. Such groupings have allowed existing county offices to function in some areas as larger intermediate units.

Fiscal Independence

When Article 2.5 of the Education Code was signed into law, it became possible for a county board of education to become "fiscally independent." Specifically, this meant that nearly all the duties and functions prescribed in law to be performed by the county board of supervisors on behalf of the county office of education could be transferred to the county board of education. A major function transferred is the one allowing the county board, instead of the county supervisors, to approve the county office operating budget — hence the term "fiscally independent." When fiscally independent, the county board, not the county board of supervisors, can acquire, hold and convey real property for the purpose of housing the county office of education. In addition to the budgetary responsibilities there are other housekeeping and district organizational functions that are transferred to the county board of education when it becomes fiscally independent.

Approximately one-third of the county boards of education in the state are fiscally independent.

County Committees on School District Organization

Division 5 of the Education Code outlines the law regarding county committees on school district organization. There are generally two patterns to these

committees: 1) those where a separate committee is elected by a majority of the representatives of district governing boards, and 2) those where the county board serves as a committee (See Education Code Sections 3141-3163.)

In 1949 the state board of education and the county committees on school district organization assumed the duties of the State Commission on School Districts which had been studying procedures and making recommendations for district reorganization. The county committees have been responsible for studying the school district organization of the county and providing data for recommended changes to the State Board of Education which holds hearings throughout the state on the proposed changes. Any committee recommendation approved by the State Board of Education must be placed before the electorate and be approved by a majority of the votes cast, before it becomes effective.

In 1959 the legislature required each county committee to provide for a master plan placing all the territory of the county in unified school districts or to provide intermediate steps of reorganization leading toward such a plan. Intermediate steps of reorganization could be accomplished either by annexation to an existing district or by consolidation of two or more school districts of the same educational level.

The 1959 legislation did not mandate unified districts but required that a county-wide master plan be prepared and that elections necessary to implement the master plan be held following approval by the State Board of Education. The Unruh Bill of the Sixties provided stringent requirements for unification with strong emphasis toward reducing the number of school districts within the state.

In 1964 the legislature established as its policy that the unified school district is the form of district organization that provides a coordinated program of education that is best able to provide services efficiently and that makes best possible use of resources.

However, lack of responsiveness felt by people in large districts has caused a reevaluation of the size of school districts. There has been increased community involvement in the schools with the establishment of citizens advisory committees, and people are demanding opportunity to help make decisions affecting the local school districts. The larger districts are discovering that it is difficult to include the public directly in its administration of the schools. There are plans generated to decentralize the larger districts, but little success has evolved regarding the plans.

Local boards of education do have a responsibility to examine the structure of their districts periodically to determine whether the district is organized in the best way to provide the best educational services obtainable, or whether another form of organization would better meet the needs of the students and the community.

Local Board of Education

As outlined in Section 921 of the Education Code every school district shall be under the control of a board of school trustees or a board of education. Unless otherwise provided in Education Code Sections 923.5 and 924.5 and commencing with 1120, a board shall consist of five members elected at large by the qualified voters of the district. Terms of the members shall be for four years and staggered so that as nearly as possible one-half of the members shall be elected in each odd-numbered year. A unified district as formed under provisions of Chapter 10 of Division 5 of the Education Code may have a governing board of seven members. Officers of the board include the president, vice-president who presides in the absence of the president, and the clerk of the board.

Qualifications of Members

Legal requirements for persons seeking to become board members are simple to fulfill. A candidate must be 18 years of age and must meet the requirements of a registered voter living within the district in which he hopes to serve as a board member.

A person wishing to declare candidacy must file proper forms with the office of the registrar of voters.

Term of Office

Recent California legislation has significantly altered terms of school board members. The "lame duck" period that formerly existed, between the election of new board members and incumbents and the retirement of board members who did not seek reelection, has been eliminated. Legislation adopted in 1973 established the first Tuesday in March on odd-numbered years as the date for school board elections. In 1974, legislation eliminated the "lame duck" period by concluding all board terms on March 31, which would normally have expired on June 30, and provided that new board members, or incumbents, be seated April 1 and immediately assume their duties as board members. Timing is different for districts whose elections are consolidated with city elections, and as determined by their charter.

Filling Vacancies

The method for filling vacancies on school boards is outlined in the Education Code Section 1162. A school board has the authority within 30 days after a board member's resignation to appoint a person to the vacancy or to call an election to fill the post. The appointed individual remains a provisional appointee for 30 days while his/her name is posted and published in a newspaper of general circulation. Also noted is the date his/her term will expire.

Persons objecting to the appointed nominee must file a petition with the

county superintendent of schools within 30 days after the announcement of the nominee. The petition must be signed by a certain percent of the registered voters who voted in the last governing board election. The percent will vary with the size of the district. (See Education Code Section 1162C) The cost of the election must also appear on the petition. The district bears the cost of the election.

Upon receipt and validation of the petition, the county superintendent orders an election to be held to fill the vacancy. The election may be held on any day and is one of the few exceptions to the requirement for holding local elections in conjunction with state elections.

If for any reason vacancies should occur in a majority of the offices on any school district governing board, the president of the county board of education having jurisdiction may appoint members of the county board of education to the school district governing board until new members of the governing board are elected or appointed.

District Superintendent

A district superintendent may be employed, under Section 935 of the Education Code, if a school district employs eight or more teachers. The superintendent is the executive officer of the board and in most cases serves as secretary of the board. In order to free the superintendent for active participation in discussions, a clerical employee should take minutes of the board meetings and perform other clerical duties.

In addition to serving as chief executive officer, the superintendent has responsibility for the following tasks:

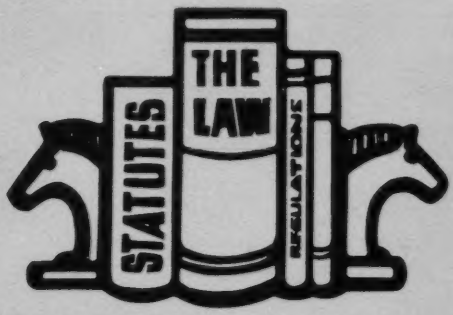
1. overseeing the accurate accounting of school funds and properties
2. submitting the annual budget to trustees
3. entering into contracts for, and on behalf of, the district
4. assigning all employees of the district in positions requiring certification, upon approval of the governing board
5. transferring teachers under district adopted policy within the district
6. determining the validity of certification qualifications

In addition, he/she is responsible for keeping board members informed of all facts necessary for an understanding of the problems raised at board meetings.

Legal Advisers

The legal adviser for school districts is the district attorney and/or the county counsel of the county in which the district is situated. A board may retain private counsel after conferring with county counsel. The responsibility of the Attorney General is to render opinions upon request by state officers, members of the legislature and/or the legal counsel of the district. A written confirmation of a

legal opinion should always be obtained. Whether from the county counsel, the district attorney or the Attorney General, such an opinion is only advisory to the board and the final responsibility for action is with the board itself. However, a board should be extremely careful before disregarding the advice of its legal counsel.



School District Classifications

School districts in California are classified according to grade levels and territorial jurisdiction. Elementary districts are authorized to maintain grades kindergarten through 8th, and they may operate preschool programs. High school districts are usually organized to maintain grades 9-12 inclusive. They may, under certain circumstances, operate grades 7 and 8. They may also conduct adult education programs.

In addition to elementary, high school and community college districts, there are a number of unified school districts within the state which are authorized to maintain all grades, kindergarten through 12, and operate all elementary and high schools within its boundaries under one board and one administration. They may also oversee such auxiliary programs as preschool and adult education.

It is interesting to note that there are five "single district" counties within the state — Alpine, Del Norte, Mariposa, Plumas, and San Francisco.

A definition of the various types of school districts is as follows:

- Single Elementary

  A single elementary district is one which operates a program for kindergarten through 8th grade, or grade 1 through 8 under one administration and one board of a specified geographical area.

- Union Elementary

  This district covers territory formerly included in two or more single elementary districts and is administered by one administration and one board.

- City Elementary

  Every chartered city other than sixth-class cities, constitutes a separate elementary school district unless the charter provides otherwise. Provisions

exist for unincorporated areas, nonchartered cities and sixth-class cities with required assessed valuation and ADA to form city districts upon approval of the electorate.

- Joint Elementary or Joint Union Elementary

  These districts are the same as single or union elementary districts except that they include territory in more than one county.

- City High School

  A territory governed by a city board of education only if specified in the charter.

- Union High School

  Territory governed by one board of education which includes the territory of two or more elementary districts, each administered by its own governing board having no legal or organizational connection with the high school governing board.

- Joint Union High School

  Same as a union high school district except that the territory of the district lies in more than one county.

- County High School

  Same as a union high school district except that the county and school district boundaries are coterminous.

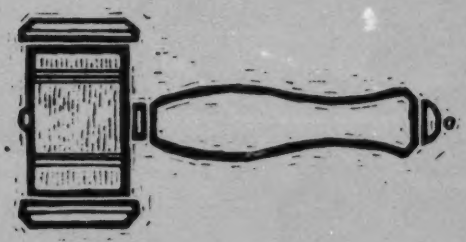
- Consolidated High School

  Although the Education Code provides for the formation of consolidated high school districts, the requirements are so restrictive that none have been formed to date.

4

Board Meetings

A good board meeting begins on time, ends on time and moves efficiently through the agenda with homework done in advance by all concerned. If meetings consistently last longer than two or three hours, some changes are in order.



The President Presides

The board president, who is elected annually at the organizational meeting, has the responsibility for presiding over meetings. Therefore, one of the major qualifications of the board president is that such a person possess skill and good judgment in presiding. He/she should have knowledge of parliamentary procedure but not be overly formal in its application. The president should insist that all who have pertinent ideas be allowed to express them, but should be willing and able to keep discussions to the point. He/she should vote on all issues and participate in the discussion as he/she sees fit. The board president is elected at the annual organization meeting held between April 1 and 15 of each year as specified in Section 964 of the Education Code.

The Agenda

The board president should devote some time to reviewing the agenda with the superintendent prior to a board meeting. The agenda is prepared by the superintendent and her/his staff in consultation with the board president. Individual board members should inform the board president of items they wish to have included. The agendas and supporting papers, consisting of factual data and reports, should be distributed to board members at least two to three days in advance of the meeting to provide proper time for study.

The agenda for regular meetings must be posted at a place where parents and teachers may view it at least 48 hours prior to the time of the regular meeting and, in the case of special meetings, at least 24 hours prior. Agendas must contain sufficient detail for the public to ascertain the nature of the business to be conducted (Education Code Section 966). Agendas should also be sent to the press and other news media.

Meetings Open to the Public — Brown Act

Because of the chapter in the Government Code commonly referred to as the Ralph M. Brown Act (Chapter 9, Division 2, Title 5) which was enacted in 1953, school board meetings must be open to the public. The intent of the Brown Act is very clear when it states:

> Public commissions, boards, and councils and the other public agencies in this state exist to aid in the conduct of the people's business. It is the intent of the law that their actions be taken openly and that their deliberations be conducted openly.

However California law provides for executive sessions which allows the exclusion of the public in the following instances:

1. when the board is discussing personnel, litigation, disciplinary action with any pupil of the district, or matters of national defense
2. when the board meets with its representative pursuant to the Winton Act regarding salaries, salary schedules, or compensation paid in the form of fringe benefits in order to review its position and to instruct its representative. (Government Code Section 54957.6.)
3. when the board has discussions with a state conciliator (mediator) who has intervened as authorized by law (51 O.A.G. 201). These private sessions may be held even though not specifically set forth by the Brown Act, for the Attorney General has ruled that the public interest would not be served if a conciliator or a board were required to divulge information discussed in confidence in an executive session.

Note that all official action of the board during regular or executive sessions must be recorded in official board minutes which must be open to the public for

inspection. When the board recesses to an executive session it must then reconvene for adjournment.

Board members should be aware that Government Code Section 54959 provides that "each member of a legislative body who attends a meeting . . . where action is taken in violation of any provision of the Brown Act, with knowledge of the fact that the meeting is in violation thereof, is guilty of a misdemeanor."

Also note that according to a recent case, a board member whose leakage of information from an executive session is in violation of board policy may be liable and charged with a misdemeanor.

In the CSBA publication *Brown Act Requirements for School Board Members*, detailed information is presented on what constitutes a meeting, types of meetings, justification for executive sessions, and and requirements for meeting notices. Information is also given for proper recording of board meetings.

Mechanics of Meetings

School board decisions are considered valid under the law only when a quorum (majority of the board membership) is present. An affirmative vote of the majority of the membership belonging to the board is required for successful passage of a proposal by the board. Section 1165 of the Education Code reads:

> Whenever any of the offices on any school district governing board are vacant, the remaining governing board member or members, if any, and any governing board member or members elected or appointed to fill the vacancies, who have qualified, shall have all the powers and perform all the duties of the governing board.

The time and place for official meetings should be decided upon by the board at its organizational meeting held between April 1 and April 15. Regular meetings should be held at least once a month. If a regular meeting falls on a holiday, the board must reschedule the meeting for the next business day.

An adjourned meeting, actually a continuation of a regular meeting, can be scheduled by including in the minutes the time and place of the extra session. Special meetings may be called at the request of the presiding officer or a majority of the board. The only business that may be conducted at a special meeting is that which is posted in the notice of such a meeting.

When the Public Wants to Speak

The public can and should have a voice in Board considerations, but according to the Education Code 54957.9 no person or group has the right to obstruct the deliberations of the board. Board members are urged to adopt formal written policies in order to allow interested citizens the opportunity to speak within established time constraints before board action is taken. Many boards have a des-

ignated place on the agenda at which time persons in the audience may indicate their desire to speak on a particular item or to present petitions. Persons who wish to have the board act on a particular item should be required to have the item placed on the agenda prior to its distribution to board members.

Persons addressing the board should be required to state their name and address to the president. Many district policies provide the board president the perogative to limit the time permitted any individual or faction to speak to an issue. This may appear to be overly restrictive, but there must be some protection against the occasional visitor who insists upon endlessly repeating a certain point of view.

Special Committees vs. Standing Committees

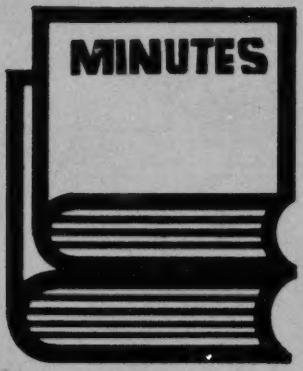
Standing committees are of questionable value. There would be little need for permanent subcommittees if boards concerned themselves only with major policy functions. Details of factfinding, reporting, and administration should be delegated to the superintendent and staff.

The dangers of having standing committees include the tendency towards specialization and interference in management functions. The advisory function of the superintendent is usurped if the board does not consider itself a "committee-of-the-whole." Critical study and free discussion may become limited if a small committee of the total board membership makes recommendations. Misunderstandings may result from the belief that the board is committed to accepting the subcommittee's recommendations.

Special committees, those which are appointed for a specific task and for a limited time, may serve a useful function. An example is the screening committee, which screens the applications for the position of superintendent so that the whole board may consider only the best-qualified candidates. Some factfinding tasks may lend themselves to special committees rather than to the superintendent or the staff because some special ability of a member might be used by the creation of such a committee. The trend, however, is away from permanent or standing committees. Any committee action does not become official until the board approves such measures at a legal meeting.

Importance of Board Minutes

It is imperative to keep adequate board meeting minutes as they have the status of official legal documents. Courts frequently refer to them as policy on which to decide disputes. Minutes of the prior meeting should be duplicated and distributed to the members of the board with the agenda for the next meeting. This practice provides members the opportunity to study the minutes carefully and to retain a copy for their personal files. It also makes it unnecessary to consume board time with an actual reading of the minutes. The minutes may be approved as circulated, or modified and then approved.



The minutes must include a record of each board action. Lengthy discussions may be briefly summarized, but motions should be carefully worded before they are accepted and seconded and these motions should appear in the minutes exactly as the board acted upon them. If the length of complete resolutions or documents makes them impractical for inclusion in the minutes, they should be identified through references, and it should be indicated that they are attached. In order to keep the minutes book from becoming too bulky, contracts, petitions, and lengthy resolutions may be briefly described and identified and placed in files for easy reference. A record of the names of those voting for and against each question should appear in the minutes unless action is unanimous.

The official minutes should be put in a bound journal. They should be indexed and coded by means of marginal references or topical headings and possibly by the numbering of each individual action according to the corresponding agenda item. An index should be prepared on at least a fiscal-year basis and bound with the official copy of the minutes for that period.

At the time of approval by board action, the official copy of the minutes should be signed by the clerk or secretary.

Handling Complaints

No board of education or professional staff will ever be able to please everyone in the district. There will always be some complaints and criticism. Some will be justified; some will be based on a lack of information or misinformation. In either case, criticism cannot be settled by being ignored. An acceptable grievance procedure for handling complaints and criticism should be adopted as official board policy.

The channel for complaints and criticism on which action is requested should always be through the superintendent to (if necessary) the board. An individual board member has no legal right to promise action or correction, and he has a moral obligation to refrain from doing so. Rather than conduct one's own investiga-

tion of a complaint, a board member should refer the matter to the superintendent for staff investigation, and a report back to the board.

A serious complaint or criticism should be presented to the board as a written, signed statement, or alternatively, the individual should be invited to appear before the board and the matter should be made part of the agenda.

Individual board members should inform the superintendent of complaints and criticism even though no action is requested. In turn, the board should be kept informed by the superintendent of such criticisms so that no pressure could erupt in the community before board members have knowledge of the facts in the matter.

Establishing Policy – A Primary Responsibility

By far one of the most important functions of the school board is the formation of educational policy.

The decisions made by school boards set the course of education in a community immediately and for years to come. Ultimately, the quality of education depends upon the wisdom and care with which the decisions are made.

Purpose of Policies

Written policies are statements which set forth the purposes and prescribe in general terms the organization and program of a school system. They create a framework within which the superintendent and his/her staff can discharge their assigned duties with positive direction. They tell what is wanted. They may also indicate why and how much.

Policies should *not* deal with the detailed descriptions of the ways in which the purposes and objectives are to be accomplished. These specific directions — telling how, by whom, where, and when things are to be done — are administrative directives. They implement policies.

This distinction between policies and administrative directives need not imply that policies should deal only with abstract expressions of theory and philosophy. Policies must not become lofty pronouncements of high sounding purposes not connected to actual practice. At the same time they must not become hopelessly involved in a great mass of detailed directions and instructions.

Much of the confusion arising from efforts to determine whether something should be a policy or an administrative directive grows out of a lack of understanding of the relationship between the school board and its chief administrative officer, the superintendent of schools. By virtue of the powers with which it is vested, the school board is the final authority in the setting of policies. A board is functioning within its recognized sphere of activity when it reviews the adminis-

trative directives that are consistent with its policies. But it can quickly find itself in a position of meddling and interfering if it attempts to deal with details that are a part of the administrative operation of the schools. Execution of school board policies through the detailed steps and procedures of school administration is the job of the school superintendent.

The Superintendent/Board Relationship in Policy Making

The best operational situations within the school district occur when a spirit of teamwork and cooperation exist regardless of the degree to which some of the functions overlap.

Griffiths[1] defines the situation as follows:

> "This interrelation comes about because the board needs to know certain facts which only the superintendent has, before policy can be made wisely. Likewise, in order to administer policy, the superintendent needs to understand all ramifications of the policy, and he [*she*] can do so only if he is in on the development of the policy from the outset. in actual practice, in good school situations, it has been found that the superintendent normally supplies the evidence on which the board makes the policy. The board, in turn, is interested in the administration of the policy and checks on it by asking the superintendent to make periodic reports. In this manner, the board exercises control over the administration of the school. In other words, the board acts in matters relating to over-all policy decisions, while the superintendent advises; after the board decides, the superintendent executes. After he executes policy, the board in turn evaluates."

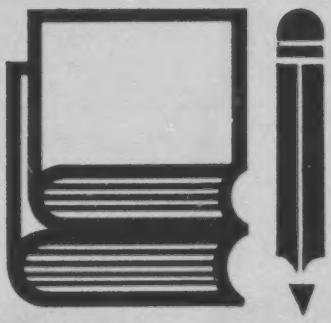
Why Have Written Policies?

First of all, the law requires it; policies on different topics are required by numerous sections of the *Education Code*.

Other advantages are:

1. BETTER TEAMWORK — more control for the board, more freedom for the administrator, better communications with the staff.
2. FEWER DECISIONS — because well-thought-out policies make most of your decisions automatically for you.
3. FLEXIBILITY — because policies may be revised at any time need dictates such action.
4. LESS PRESSURE FROM THE COMMUNITY — because written policies quickly answer complaint type questions.

[1]Daniel E. Griffiths, *Human Relations in Administration*. (N.Y.: Appleton-Century-Crofts, Inc. 1956), p. 327.



5. BETTER PUBLIC RELATIONS — because reporters understand and respect written policies.
6. CONTINUITY OF OPERATIONS — because written policies constitute a "memory system" assuring consistency.
7. BETTER BOARD MEMBERS — because each member understands his proper role — and the board's objectives.
8. PUBLIC CONFIDENCE — because the community sees you are proceeding in an orderly, business-like manner.
9. BETTER STAFF MORALE — provides uniform and fair treatment.
10. EARLIER ADJOURNMENTS — because written policies save you untold hours of time over the course of a year.

Philosophy Behind the Policy

Policies adopted by a board of education should reflect certain convictions about desirable educational goals for the schools. These convictions form a philosophy of education and provide a basis for evaluation. A philosophy of education should reflect the common goals of education as well as the individual character of the community, its needs, conditions, and resources.

A rural community, a suburb, and an industrial city, will each have some different expectations for the schools and the philosophies of the school board in each area will reveal these differences. The framing of specific objectives should follow a statement of fundamental beliefs. An example of a Philosophy of Education which has been adopted by a school district in California is printed at the conclusion of this book in Appendix A.

Each school board, in concert with its community, should develop its own philosophy of education. In drafting this statement of philosophy the superintendent and staff as well as informed citizens and community leaders should be involved in the task. Periodic reviews of the basic philosophy should be the

responsibility of the school board along with staff and community leaders. For help with this often complicated task, special instruments have been designed. For more information contact CSBA.

Development and Adoption of Policies

Once a school board has become convinced that written policies are desirable and beneficial in the discharge of its responsibilities, it is ready to begin the process of putting them into writing. Effectively written school board policies should:

- provide the general authority and support for all programs and activities conducted by the school district.
- provide for relative emphasis and allocation of resources and the quality of educational offerings.
- be brief, clear, concise, yet complete.
- be stable despite personnel changes.
- contain a minimum of direct quotations from the law.
- have adequate provision for review and amendment.

> "Good policies . . . are guidelines that steer the educational ship of state in the right general direction; administrative regulations and procedures provide the force and means which move the ship on its specific and right course. Policies authorize what and why something is to be done. They should be in the form of broad principles that define the intent of the board. Administrative regulations and procedures tell how, when, where, and by whom something is done. They must reflect legal and board policy requirements and at the same time describe in specifics how these mandates are to be carried out."*

Whatever procedure is adopted for developing policies, it should be written down and adopted by the governing board. In this way, it assures itself and other groups in the district that policies will always be developed and adopted in the same manner and subject to the same requirements. This eliminates many of the challenges to new policies on procedural grounds and permits the board to concentrate on the substantive issues raised by the policy.

The specific procedure to be used for the development and adoption of policies is up to each individual district. It can consist of whatever steps the governing board deems advisable. It must include formal adoption by the board.

Sample policies on the development and adoption of policies can be obtained by contacting CSBA.

*From "Written Board and Superintendent Communications — Boon or Boondoggle in Your District?" (1964) a paper by Paul L. Seramur, then Systems and Procedures Analyst, San Diego City Schools.

Where Do I Start or How Do I Continue?

Logically, the first move involves pulling together records and materials that will help the board of education find out where it must begin work. Such steps often include the following:

1. *Review the minutes book.* Records of positions taken, as stated in resolutions and in reports of board discussions preceding action, will shed light on many items that should be covered by written policies. Just checking the frequency with which some subjects have been considered by the board may suggest a need for a rule or regulation to be established.
2. *Study what other boards have done.** Sets of statements developed by other school systems, if properly used, will be a valuable source of help as guides, but not as models to be adopted in total. A board will do the job of producing policies that best meet local needs, if it writes its own.
3. *Consult studies and writings of others.* Aids can be secured by looking into materials produced, much of it recently, by specialists on the subject. Some of the sources of information are guides and handbooks prepared by state departments of education, state school boards, associations, and state associations of school administrators. Also, a number of recent books on school administration discuss school board policies.
4. *Check on established practices.* Some of the best school board policies have become imbedded firmly in the operations of the board without ever being recorded in the minutes or elsewhere. For example, the fact that the board always follows the practice of purchasing wherever it can get the lowest price for a given quality may not be written down anywhere. It has become well established with only the lack of contrary action to indicate the fact. Putting such "unwritten" policies into written statements will be an important part of policy development.
5. *Solicit suggestions from the school staff.* This may be undertaken, and with profit, as an activity related to the initial steps of policy development. In fact, the Winton Act encourages it.
6. *Consult the Education Code.* The Education Code mandates that boards establish policies in many areas. The CSBA/ACSA document "California Education Code Analysis and Index" extracts those sections of the Code that are mandatory, permissive, implied, or prohibited. This could be of assistance in policy requirements.

*NOTE: The California School Boards Association has an extensive Reference Library of more than 900 volumes and on request, will send sample copies of rules and regulations on a particular subject.

Question Your Board's Policies — Constantly*

When you arrive at the board room for a meeting, or for any board of education work session, you'll find it of greatest usefulness to bring with you a set of special questions. Use them, one at a time, at the appropriate time. When the board gets into a long and tiresome discussion upon some point, bring out one of these questions: "Do we have a policy on that problem? If not, why not?" And at other occasions, when the hour grows late, board members become fidgety, and the debate meaningless, put the other questions to work:

"Didn't we enact a policy on this question last year?"

"Why don't we refer that group of protesting people to our policy manual?"

"Isn't it time we updated that old policy? It just doesn't make sense now."

"When are we going to develop new policies on that new situation?"

When you use such questions you reveal yourself to be a policy consumer, a policy enforcer, policy questioner, policy starter, or policy innovator. innovator.

Board and Community Relations

A board needs a policy to direct its communications with citizens. Very often, the only time board members hear from citizens is when those citizens are upset about something. Then the telephone starts ringing and board meetings are packed with spectators.

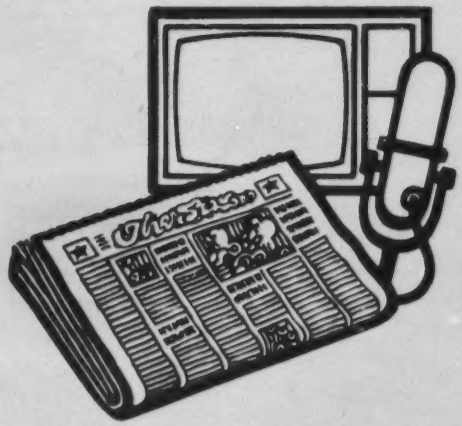
One way to obtain systematized "feedback" of public opinion about the schools is through the use of a properly conducted opinion poll. A variety of polls are available and boards should consider carefully which type of poll will bring the information needed to help in guiding the educational program, or policy formation.

Another method of communicating with citizens is the development of citizens advisory committees. These committees are helpful to boards not just at school financial elections but in various aspects of the operation of the schools. Parents may be asked to serve on communication advisory councils in individual schools. At the district level, citizens may serve on curriculum planning committees, policy advisory committees, transportation policy formation committees and food service programs.

Before school boards endorse the utilization of citizen advisory groups, they must be prepared to listen to them, to seriously consider their recommendations and suggestions. Advisory committees are not "window dressing." They can be helpful in dispelling public apathy or misconceptions about school matters. They can help gain community acceptance for educational programs and projects.

*The School Board Member's Guide to Policy Development — Ben Brodinsky — NSBA Publication

However, it is paramount that a distinction between the advice obtained in the development of general policy and the implementation of that advice be clear at all times. Citizens advisory committees are not involved with implementation of policy.



Methods for Board Communication with the Public

Since boards also need the understanding and support of the community, the needs, conditions, and resources of the school must be clear to every citizen. Policies and procedures should explicitly support full cooperation with the press, radio and television in disseminating news about the schools, including an emphasis on open meetings and an adequate briefing on the purposes of executive sessions. Furthermore, policies on press relations should be in writing and should clearly designate who is to be the spokesperson for the district and to handle press inquiries. Usually this responsibility is delegated to the superintendent or to the board president or both. Full cooperation includes a willingness to give facts not favorable to the schools as well as those that are favorable.

In addition to cooperation with the press, radio and television, a program should provide for bulletins to parents, explanatory pamphlets and brochures (made attractive and readable), school programs and exhibits, speakers' bureaus, and should make a continuing effort to get the public into the school to observe the activities and the facilities.

Many community organizations, in addition to parent-teacher organizations, are greatly concerned with the quality of education and are potential aides for creating favorable community attitudes toward public education. A list of most of these is included in Appendix B.

6

Understanding School Finance – Another Primary Responsibility

Cost is of primary concern in planning a school program. It is increasingly difficult to find tax dollars to meet demands for increased salaries, fund programs properly with equipment and supplies, and keep the physical plants in good operating order. Moreover, a thorough knowledge of income and expenditures, the district budget, is essential to a board member interested in obtaining the finest educational program with the dollars available to the district.

Sooner or later all educational objectives must be translated into their equivalent in dollars and cents. It is the responsibility of the board to plan and secure the financial resources necessary to realize an educational program which fits the needs of the district's students.

Board members must be aware that schools compete for the tax dollar at the local, state and national level with other services of government. Therefore, they should accept the responsibility for stating the needs of education, not only to the local taxpayers but on appropriate occasions to the State Legislature and the United States Congress as well.

The governing board is constantly faced with complex problems of business management. Thorough briefings by the district business manager and the superintendent will be helpful to board members in making wise fiscal decisions. Research shows that this phase of the school program generally occupies more of the board's time and attention than any other.

Glossary of School Finance Terms

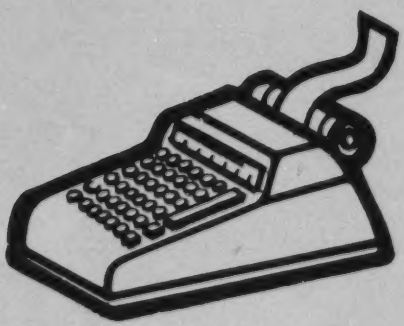
When a board member is first confronted with the vocabulary needed to express fiscal terms and fill out the myriad of financial reports required by State and Federal governments, he often finds a need for a specialized dictionary. The following is a miniglossary of financial terms to help new board members confronted with alien terminology.

A.D.A.	Average Daily Attendance. One "ADA" is generated by the attendance of one student for a minimum of 240 minutes per day for 175 days in a school year. Absence for illness is not considered absence in computation.
Ad Valorem Property Tax	A tax on real property expressed as a percent rate per $100 of assessed valuation.
Apportionment, State	Dividing and assigning state allocated money to the various school districts. This is only done by the State Department of Education according to formulas approved by the Legislature.
Assessed Valuation	A valuation set by a governmental unit upon real estate or other property as a basis for levying taxes.
Assessed Valuation Per A.D.A.	The amount of assessed value per child determined by dividing the total assessed valuation by the total A.D.A.
Basic Aid	The minimum guaranteed amount that any district receives annually for State Support currently in the amount of $125 per A.D.A.
Bonds, School	Bonds are certificates of indebtedness in writing. They are confined by law in California to twenty-five years longevity or less. Bonds are somewhat to a school as a mortgage is to a home.
Bonded Debt Limit	The maximum amount of bonded debt for which a school district may legally obligate itself. The

	total amount of bonds issued cannot exceed a stipulated percent of the value of the taxable property of the district.
Budget	A plan of financial operation embodying an estimate of proposed expenditures for a given period or purpose and the proposed means of financing them.
Capital Outlay	Capital outlay expenditures are those which result in the acquisition of fixed assets or additions to fixed assets. They are expenditures for land or existing buildings, improvement of sites, construction of buildings, additions to buildings, remodeling of buildings, or initial or additional equipment. Salaries and other expenses of school district employees, such as architects and engineers, who are hired or assigned to capital improvement projects also are included.
Total Current Expense of Education	The current operating expenditure of a school district including all expenditures excluding expenditures for food services, community services sites, buildings and debt service.
District Support or Aid	The financial assistance for schools received from local property taxes.
Double Entry	A system of bookkeeping that requires an amount credited for every corresponding amount debited.
Encumbrances	Obligations in the form of purchase orders, contracts, salaries, and other commitments chargeable to an appropriation for which part of that appropriation is in reserve.
Fiscal Year	A period of one year the bginning and ending dates of which are fixed by statute. In California it is the period beginning July 1 and ending June 30.
General Reserve	The total savings that a district has accumulated. It is not appropriated for any specific purpose but is an account to provide cash for the succeeding fiscal year before taxes and state funds become available.

Collier Factor	A formula to bring either low or high county assessments of real property to the state average of assessed real property.
Computational Tax Rate	The minimum tax rate a school district must levy which provides the districts share to the state's guaranteed foundation program. SB 90 establishes these rates as $2.23 elementary, $1.64 high school, and $3.87 unified.
Defined Adult	A special foundation program definition created for the education of adult citizens. Age and enrollment time are qualifiers.
Equalization Aid	The amount of the State's contribution to the state's guaranteed foundation program less the $125 basic aid grant per child.
Foundation Program	A state guaranteed level of financial support per ADA derived from specified Federal, State, and local sources that is deemed sufficient to provide a defensible education program in each school district. The state's contribution to the foundation program will vary inversely to the assessed valuation behind each student in the individual district (see Equalization Aid). SB 90 raised the foundation program guaranteed levels in 1973-74 to $765 per ADA elementary, $950 per ADA high school, and provided for a specified annual upward adjustment of these levels. The expenditure of districts considerably below these levels is allowed to rise at an annual rate of up to 15%.
General Purpose Tax Rate	The district's tax rate up to the statutory limit for general purpose use determined by the district's budget and the level of the assessed valuation of the district.
Impact Funds	Funds received by school districts due to increased enrollment caused by Federal or State activities on property that is not taxable. Examples would be Federally funded State Water Projects, or Public Law 874 (army bases, defense plants, etc.).
Inflation Factor	Permitted annual increase in revenue limit related to the increase in the cost of living.

Permissive Override Tax	A tax, levied at the discretion of the board of trustees for a limited number of specific purposes authorized in the Education Code. Two examples are a tax levied for community services, and meals for needy children.
Revenue Limit (District)	The maximum amount of dollars that a district receives annually for general education purposes from both state aid and local taxes, exclusive of a limited number of special categories.
Secured Tax Roles	The stationary real property within a county, i.e., land, buildings. (Accounts for approximately 90% of all property).
Unsecured Tax Roles	The moveable, personal real property within a county, i.e., mobile homes, boats, furniture. (Accounts for approximately 10% of all property.)
State School Fund	Amount apportioned from the State General Fund by the Legislature for school purposes.
Undistributed Reserve	An amount placed in the budget against which interbudgetary transfers may be made to take care of expenditures that develop in the budget for which previous funds have not been budgeted.
Voucher	Any document that supports or verifies a certain transaction.



School District Budget

School boards are required by law to approve school district financial reports. These reports detail the income and expenditures of the district for the fiscal

school year. They are prepared on forms prescribed by the State Superintendent of Public Instruction.

In 1973 the school accounting system was completely revised. The new system established procedures for the accounting of income and expenditures by "object" rather than by "function." By so doing it has made possible "program budgeting" within school districts. (see section on program budgeting.)

To meet state legal requirements two basic fiscal reports must be submitted each year. The first is an annual financial report. The annual financial report is the basic reporting document of the school district and has three distinct parts: 1) income by source which itemizes beginning balance, income by source and incoming transfers; 2) expenditures by object which itemize the various classifications of expense, other outgo and ending balance; and 3) expenditures by general education, special education, and support service programs which summarize the instructional and support program costs and other outgo.

The second fiscal report to be submitted at the end of each year is the cost data report. It is used to identify costs of special projects and other programs as they may be needed. It itemizes the major objects of expenditure and support charges to identify total costs of individual programs. This format of reporting also can be used internally by school boards when they need program cost information for management purposes.

Of the several required financial report forms, the one board members most commonly refer to is the expenditures by objective section of the annual financial report. Listed are a few of the more important classifications to be found under this section:

Objectives of Expenditure Classifications

1000 Certificated Salaries
- 1100 Teacher's Salaries
- 1200 School Administrators' Salaries
- 1300 Supervisors' Salaries
- 1400 Librarians' Salaries
- 1500 Guidance Welfare, and Attendance Salaries
- 1600 Physical and Mental Health Salaries
- 1700 Superintendents' Salaries

2000 Classified Salaries

3000 Employee Benefits
- 3100 State Teachers' Retirement System Annuity Fund
- 3200 Public Employees' Retirement Fund
- 3300 Old Age, Survivors, Disability and Health Insurance
- 3400 Health and Welfare Benefits
- 3500 State Unemployment Insurance

- 4000 Books, Supplies and Equipment Replacement
  - 4100 Textbooks
  - 4300 Instructional Supplies
  - 4600 Pupil Transportation Supplies
  - 4700 Food Services
- 5000 Contracted Services and Other Operating Expenses
  - 5200 Travel and Conference and Other Expense Reimbursed
  - 5300 Dues and Memberships
  - 5400 Insurance
  - 5500 Utilities and Housekeeping Services
  - 5600 Contracts, Rents and Leases
- 6000 Sites, Buildings, Books and Media, and New Equipment
  - 6100 Sites and Improvement of Sites
  - 6200 Buildings and Improvement of Buildings
  - 6400 Equipment
    - 6410 Audiovisual Equipment
    - 6420 Library Equipment
    - 6430 Food Service Equipment
- 7000 Other Outgo
  - 7100 Debt Service
    - 7110 Annual Repayment on Account of Public School Building Apportionment
    - 7120 Annual Repayment on Account of State School Building Apportionment
    - 7130 Bond Redemption
    - 7140 Bond Interest and Other Service Charges
  - 7200 Outgoing Tuition
  - 7300 Interfund Transfers
  - 7900 Appropriation for Contingencies

Board members should have a basic understanding and working knowledge of financial reporting forms. The superintendent can provide copies. In addition, a recommended reference manual is the State Department of Education publication entitled, "California School Accounting Manual, School Business Administration Publication #8".

There are specific actions and deadline dates that must be met as the board proceeds to consider and finally adopt the school budget. These dates are found in the Education Code along with the necessary action which must be taken. Chapter 12 consists of a legal calendar outlining dates that boards of education must meet. Action required by boards in meeting these dates include filing a tentative budget with the county superintendent of schools, receipt of the tentative budget from the county office, filing of the publication budget, adoption by

certain districts of the budget, publication of budget, holding of a public hearing on the budget, and final adoption and filing of budget with proper authorities.

Financing Public Education in California

Public education in California is financed by a blend of revenue received from the federal government, the state government, and from local tax sources. Historically the major portion of support has been generated from local property taxes augmented substantially by state revenues. Federal support has been relatively minor though rising substantially in recent years. During the 1972-73 fiscal year income by percentage from various sources was identified as 56.61% from local revenue; 32.31% from state aid; 6.78% from federal aid, and 4.30% from other sources.

State Foundation Program

The state contribution to a local district's standard educational program is made according to state adopted formulas commonly referred to as the foundation program. In 1972 and 1973 the state legislature passed and the governor signed two bills, Senate Bill 90 and Assembly Bill 1267, that dramatically altered this method of allocating state funds to local school districts.

This legislation established the concept of the revenue limit. A school district, using the fiscal 1972-73 school year as the base year, added up all revenue from specified local, state, and federal sources and that became the district's revenue base. In addition the legislation increased the allowable foundation program levels per elementary student to $765. (The foundation program was increased by $60 for 1974-75.) A figure of $950 was set per high school student. (The unified amount per child is determined by the exact mix of elementary and high school level students that are enrolled in the unified district.)

Districts with revenue below these amounts received an additional 15% increase in their revenue limit, but no more than the foundation levels for the 1973-74 school year. The 15% annual increase will continue until districts reach the foundation program levels.

Districts at the foundation program levels receive an annual inflation adjustment not to exceed 6% per annum. Districts above the foundation program level must divide the state foundation level guarantee per ADA by the district's previous years revenue limit per ADA. If the product is less than one it is multiplied times the 6% inflation factor resulting in the district receiving less than the 6% factor.

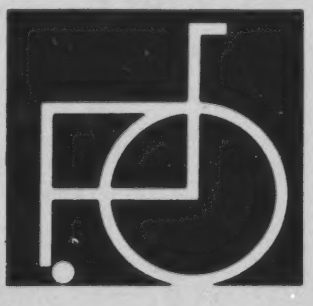
SB 90 and AB 1267 also are property tax relief measures. Some of the additional state funds goes to school districts for increased program costs and the balance is used to lower local district property taxes.

School districts are prohibited from exceeding their revenue base limit unless an increase in the limit is approved by a majority of the electors of the district.

Permissive Override Taxes

There are a limited number of permissive override taxes that a school board may levy. Funds generated from these sources would be in addition to the revenue base. They are: 1) bond and interest charge of component district (Ed. Code Section 1905); 2) development centers (Ed. Code Section 6880.16); 3) regional occupational center and regional occupational program capital outlay (Ed. Code Section 7456); 4) meals for needy children (Ed. Code Section 11872); 5) earthquake safety (Ed. Code Section 15518); 6) leasing of school building (Ed. Code Sections 15708 and 15709); 7) children centers (Ed. Code Section 16750); 8) public school building loan repayment (Ed. Code Section 19443); 9) state school building loan repayment (Ed. Code Section 19619); 10) state school loan repayment for exceptional children (Ed. Code Section 19683.5).

Also, 11) state school loan repayment for exceptional children (Ed. Code Section 19687); 12) state school loan repayment for exceptional children, (Ed. Code Section 19688); 13) state school loan repayment for compensatory education purpose (Ed. Code Section 19695); 14) community services (Ed. Code Section 20801); 15) areawide aid (Ed. Code Section 20911); 16) bond interest and redemption (Ed. Code Section 22101); 17) special assessments under Improvement Act of 1911 (Streets and Highway Code 5302.5).



Special Education

The state has an extensive financial support program for special education purposes. The education of special students generally requires more money behind each student. The major categories of special education include physically handicapped, mentally retarded, severely mentally retarded, educationally handicapped, migrants, adults and transportation for these students.

Federal Support

The most dramatic increase in recent years in support for education has been from the federal government. The trend is likely to continue. The federal government provides assistance to local school districts in many categories, but recent attempts have been made to reduce these categories by lumping federal aid into revenue sharing. Some of the major categories of federal aid to local school districts include:

- Elementary and Secondary Education Act of 1965 (ESEA) — Provides for grants to improve education of needy children, library resources, innovative programs, and handicapped children.
- Public Law 874 — Federal support to replace local tax income lost due to federal installations not taxable by local districts.
- Forest Reserve Funds — Aid to offset federal forest reserve land not taxable by a local school district.
- Manpower Development and Training Act of 1963 and Vocational Education Act of 1963 — These two acts support retraining of certain students in basic subject matter areas such as reading, writing, mathematics, and certain areas of vocational education.

School Board Financial Management

Possibly the most time-consuming and certainly one of the most important responsibilities that a school board has is managing the public school dollars. There is evident need for education to cut waste and to utilize efficiently the educational dollars spent. Beyond simply economy the people are demanding superior services and classroom results. Instruction needs to be more individualized, more responsive to the needs of the young.

Management techniques applied to school budgeting and expenditures are essential. Going beyond the mandated state requirements of preparing and adopting the annual budget, the very process of the budgets development and the board's later expenditure review offer excellent management control techniques.

The board can use the budget as a planning tool to establish district priorities for the ensuing year. This should be done early in the school year before budget preparation begins.

CSBA recommends as a management technique that the superintendent, her/his staff, and the board hold an annual planning workshop early in the budget making process. An early planning workshop will allow the management team to consider such topics as district priorities relating to the school plant, maintenance program, personnel, salaries, and other financial commitments. Deliberations can take place quietly and in depth in a productive atmosphere. The board and administration acting as a team can provide the school district with the kind of

educational leadership that will result in the best possible educational program for the students of the district.

Once adopted, the operating budget provides the basis for controlling the level and type of spending in the school system during the year. The board must be watchful that the various items in the budget are not exceeded. Such budget category reviews should take place on a regularly scheduled basis and more often on individual budget categories as needed.

Program Budgeting

The new school district accounting system makes program budgeting possible. Program budgeting allows the school district to consider the way available resources will be allocated among programs. Program budgeting means listing and summarizing what is needed to accomplish a program goal, making a decision on resources based on the goal, and then analyzing program expenditures and program results during the school year.

Other advantages of program budgeting are that it permits very specific cost analysis of existing programs, very specific cost projections of contemplated programs, assists in the most effective use of available materials and personnel, highlights areas of the educational program that are unusually weak or unusually strong, and permits rearrangement of various unit costs to reflect different program projections.

To develop a program budget a board of education must start with the total cost of a classroom including pro-rated costs of administration, custodial service, insurance costs and other related costs. Any outside costs such as special projects, or other related expenditures are also added into the total. The eventual result is the establishment of a unit cost per classroom.

From the unit cost per classroom, projections then proceed to department costs, to total individual school costs, to total educational expense costs. Added are capital outlay costs and finally the total school district costs are determined.

Resources are allocated in the budget according to program needs. Expenditures by program are then analyzed during the school year.

Financial Accountability

Accountability is one of the current terms that is being applied to a number of areas of education. It is used in reference to pupil accountability to the learning process, teacher accountability for job performance, curriculum accountability to the community, and in financial accountability to the board of trustees and the community.

PPBS (Planning, Programming, Budgeting System)

The ultimate of district accountability that involves not only financial accountability, but all other areas of educational accountability is PPBS (Planning, Programming, Budgeting System.) PPBS requires the district to analyze the situation and needs of school programs, set goals, prepare objectives, study alternate programs, review costs, benefits, and resources, select the most suitable program and carry it out, and then assess the results.

Whatever the future for PPBS, school board members should be aware of the fact that some states have already legislated into law a single unified system of budgetary preparation and accounting based on the concept of planning and program budget systems. Others have appointed commissions to study and make recommendations concerning such a system. PPBS has been called "common sense by design." Certainly it offers answers to such questions as: "Where does the money go? What have you to show in terms of results achieved?"

Audit

An independent audit of all funds controlled by the board is required by law, and, if thorough, is the best evaluation the board has of the efficiency of the business operation. Audit firms will usually indicate ways to improve practices when they check the procedures for safeguarding funds, but upon request they may also be able to suggest what kind of questions boards should ask regarding their record systems, and how to get answers to these questions.

The audit should also include a thorough check of systems controlling the flow of student funds. The California State Department of Education has published a useful guide to the administration of these funds entitled, "Accounting Procedures for Student Organization."

Liability of School Board Members

The law provides that no member of the governing board of any school district shall be held personally liable for accidents to children engaged in school work or coming to and from school. It provides that the governing board is liable, as such, in the name of the school district for injuries or property damage arising out of negligence of the district or because of a dangerous or defective condition of property.

In certain situations a school board may be charged with misfeasance, malfeasance and nonfeasance. Each board member is, however, responsible for his/her own purely personal acts, and if a personal act of negligence is the proximate cause of the injury, personal liability may result. It is recommended that a school board consult with its insurance carrier in order to obtain maximum insurance protection.

Under provisions of the Field Act (fitness of buildings for occupancy), the members of any board which has not initiated a program as outlined in 1967 legislation to rehabilitate its pre-Field Act buildings are subject to personal civil tort liability, but this liability may be subrogated and insured against. In this connection there is a widely held view that the 1967 legislation makes board members subject to criminal liability if they have not initiated such a rehabilitation program for their pre-Field Act buildings.

Insurance Requirements

Every school district must insure its property (Ed. Code Section 15802) unless exempted under the provisions of Section 15803. This is usually interpreted to mean that fire insurance must be carried. School districts are also required to carry surety bond protection for all employees who handle district funds, and they are permitted to carry such protection for employees who handle school property other than money. School districts must also carry liability insurance covering the liability of the district, the members of the board, and its officers, agents and employees. Other forms of property insurance, such as theft, glass breakage, automobile, and boiler, may be carried. There is no requirement to bid insurance since it is regarded as a "professional service" in the same light as an architect or lawyer.

District funds may be spent to provide group life, accident, and health insurance, as well as medical and hospital services for employees. A district may carry insurance covering pupil accidents but it must not sell such coverage for a private carrier to pupils or their parents. Builders' risk insurance, usually required as part of the contractual relationship between a school district and a general contractor, may be paid for by the district, and the district is reimbursed from the Public School Building Loan Fund if the building program is being carried out under the provisions of this fund. The governing board of a district maintaining junior high or high schools that offer athletic activities but do not provide or make available medical and hospital services for student participants must notify the parents or guardians of the students, in writing, of the absence of such provisions.

Serrano vs. Priest (95 Cal. 3d 584)

Changes are occurring in the method of funding education for children in the State of California. A decision in the Serrano vs. Priest case delivered in April 1974 may have profound effect on the future of public school financing.

In August 1974, a superior court judge in Los Angeles ruled on the five-year-old class action suit that California's public school financing system violates the state constitution by denying equal opportunities to students from poorer districts. The judgment was based on the heavy reliance of the level of the school program on the local property tax. School districts with relatively high assessed valuation on real property are able to generate considerably more income per child for each dollar of tax levied than are school districts with lower assessed valuation. It is a historic judgment pointing the way to future, sweeping changes in the method of financing public education in this state.

The 1974 judgment may be appealed in which case the suit could be held up in the courts for a lengthy period of time.

School District Financial and Salary Publications

There are several financial and salary publications available that are valuable resource documents to aid board members when dealing with school finance and employee salaries. Among these are:

1. California School Districts Financial Analysis (CARE document, California Agency for Research in Education)
2. District Paid Insurance Programs in California School Districts (CARE)
3. Salaries Paid Superintendents and Assistant Superintendents (CARE)
4. Teacher Salaries and Salary Schedules (CARE)
5. Salaries for Administrators and Special Services Certificated Personnel (CARE)
6. Salaries for County School Department Personnel (CARE)
7. Salary Schedules for Substitutes, Interns, Adult Education, Summer Session (CARE)
8. California School Accounting Manual (State Department of Education)
9. Governor's Annual Budget (State of California)

Instruction and Curriculum – Meeting Student Needs

The greatness of a democracy can be evaluated by the degree to which it provides its people with freedom of choice. No significant value is really tested until there is an opportunity to make a choice between or among alternatives. The search for values is the heart of a democratic educational system, and the school, the laboratory of the future.

If the prime purpose of education is to assist students to learn, then the governing board of a school district should give the highest priority to decisions affecting the instructional program. Historically, this has not been the case. Due to complexity, due to lack of time, and due to a myriad of other reasons, the instructional program area has not received the critical attention that it deserves. New values, ideas, directions and resources must be developed in the next decade to meet the challenges of the future. How can the human mind be prepared to cope with rapid change, to survive, and to find some degree of fulfillment and happiness? These are basic questions with which responsible board members must be concerned.

To assist in understanding the major elements of the instructional program, Dr. Sidney Lester[1] has created a circle diagram. In Figure 1 there are four circles identifying learning, teaching, instruction and curriculum; and the relationship each bears to the other.

[1]Lester — College of the Holy Names; Oakland, California

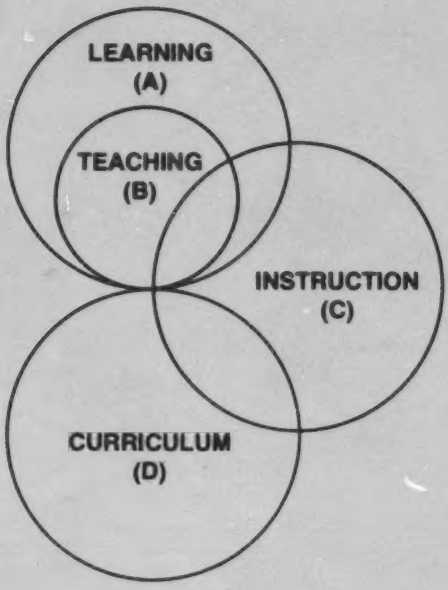


Figure 1

The four major elements and their interrelationships should be clearly delineated in the mind of each board member if you are to deal realistically with the instructional program.

a. LEARNING — All knowledge, skills, attitudes and behavior are not learned in the schools. The home, church, community and peer groups can and do influence the student. This must be kept in mind when curriculum planning and accountability models are being implemented.

b. TEACHING — Note that the circle of teaching is drawn within the circle of learning to show its relationship to the totality of the learning process. Teaching may employ the "teachable moment" (or tactics), and should be individualized when feasible.

c. INSTRUCTION — There must be an awareness of what is happening in the other three areas shown in Figure 2 — Curriculum, Learning, and Teaching if appropriate content and methodology are to be employed. The instructor must synthesize and actively seek feedback in order to plan effectively for the total instructional program (combination of strategy and tactics).

d. CURRICULUM — This consists of the courses of study prepared by the district professional staff. It is the body of knowledge developed in each of the subject disciplines, and is usually contained in the courses of study.

The governing board, in kindergarten through grade 12 school districts, is charged by law with the responsibility of adopting the curriculum and courses of study. Some community college boards have required that courses of study be prepared, but this is not mandatory.

More and more there is public demand for accountability — measuring the student "output" for the dollars expended. This implies that local boards should consider minimum standards in the courses of study. A word of caution, however, is essential. There are three domains that need to be taken into account in setting objectives and in evaluating — (1) the cognitive (factual information), (2) the affective (behavior pattern of student), and (3) the psycho-motor (learned muscle activity). Unless there are explicit directions by boards, there may be undue emphasis on the cognitive domain which is the easiest level of student achievement to measure or evaluate.

Boards should also be familiar with the *learning continuum*. There are four basic levels which are sequential in nature and which help to determine the behavior pattern of individuals and at the same time make evaluation difficult. The levels are:

1 — Knowledge and understanding.
2 — Skill and competence.
3 — Attitude and interest.
4 — Action pattern (observed behavior).

A key question that boards must continuously ask is "How do we effectively measure all four levels in the learning continuum?" The complexities of the mind make curriculum planning and instruction difficult — demanding for the professional and the school board member. It is axiomatic that the school board should spend considerable time to understand and improve the curriculum, instruction, teaching, and the learning processes (see Figure 1).

Legal Background and Other Constraints

Utilizing the recommendations of the superintendent, the local board, kindergarten through grade 12 decides the general scope of the curriculum, but does so within certain boundaries set by the state Constitution, the Education Code, the Administrative Code, and Title 5 (rules and regulations of the State Board of Education). The county board of education also provides guidelines for smaller districts. The community colleges have much more freedom in establishing the curriculum, but still follow the guidelines set forth in the Constitution, the Education Code, and the Title 5 regulations of the Board of Governors of California Community Colleges.

Although not a legal constraint, the entrance and transfer requirements of the universities and colleges do, to some degree, affect course offerings at the secondary and community college level.

Written Policy

In carrying out its legislative function, the governing board should adopt policies that relate to the many instructional program areas. As a minimum there should also be policies on educational philosophy, goals, objectives and priorities; involvement in the continuous development and improvement in the instructional program; the teaching of controversial issues including academic freedom; the selection of instructional materials; the review of instructional materials whose use has been questioned by any group or individual; and evaluation of the total instructional program on a periodic basis.

The Instructional Program Budget

The allocation of resources (time, money, supplies, personnel and buildings) is an important function of the governing board. Provision should be made in the budget for improving the educational program. In addition to the regular instructional program budget discussed under the finance section of this book, funding should be considered for instructional materials and supplies, library books and services, consultant services when necessary, use of paraprofessionals, teacher participation in curriculum revision by released time and/or compensation for extra time spent, and incentives for instituting pilot studies that may lead to the improvement of instruction.

Accountability

Since 1968-69 the Legislature has enacted new laws which have brought about more local control of the instructional program and at the same time a greater degree of accountability. Student achievement and cost are being compared and the public, the school boards, and the lawmakers are making new demands upon the profession. A few examples of key legislative enactments will highlight the trend toward decentralization, involvement, and accountability.

Probably the most significant curriculum law in California in the past 50 years was the George Miller, Jr. Education Act of 1968 (SB-1). The introduction states the intent and is contained in the Education Code, Division 7, Chapter 1, Article 1, Section 7502 which reads:

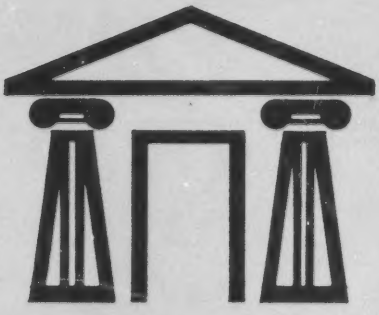
The Legislature hereby recognizes that, because of the common needs and interests of the citizens of this state and the nation, there is a need to establish a common state curriculum for the public schools, but that, because of economic, geographic, physical, political and social diversity, there is a need for the development of educational programs at the local level, with the guidance of competent and experienced educators and citizens. Therefore, it is the intent of the Legislature to set broad

minimum standards and guidelines for educational programs, and to encourage local districts to develop programs that will best fit the needs and interests of the pupils.

This was a major step toward decentralization from the state level to local governing boards.

In the same session, Assemblyman Leroy Greene introduced a major statewide educational assessment bill, AB-1168, which subsequently became law. This bill allowed more local control in SB-1, but established a state testing system to determine how well the statewide educational system (K-12) was preparing students.

Assembly Concurrent Resolution 195 (ACR-195) was adopted in 1969. It established the Joint Legislative Committee on Educational Goals and Evaluation. The charge to the committee was to determine and recommend the best means for identifying educational goals and objectives appropriate to the needs of modern society, and the means for developing a comprehensive plan of assessment and evaluation designed to measure the degree to which the public school system is achieving such goals and objectives. A large percentage of districts in the state have adopted new goals and subgoals. School boards have a continuing responsibility to update and improve these goals (or values — such as creativity, patriotism, health and safety).



Clearly, the Legislature over a period of years has been moving school districts toward an accountability system. Although there are many different models, there is basically a five-step process that educators are using more and more in educational problem-solving. The State Department of Education has been instrumental in implementing this decision-making tool through workshops, through Operation PEP (Preparation of Education Planners), and through the

process of setting up criteria for grants to local school districts. An *accountability model* is now widespread in California in educational planning. Figure 2 and the explanation following it, may help you understand the process, and more effectively enter into constructive problem solving. A major element is the constant recycling and that is why the circle is used to indicate that the process is a never-ending one.

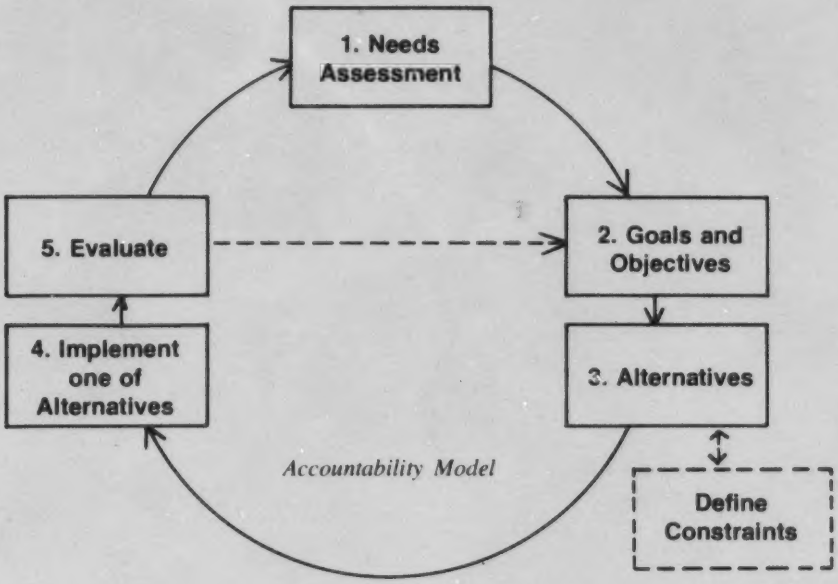


Figure 2

1. Needs Assessment — Decentralized decision-making has also brought forth a demand for involvement of all segments interested in the educative process. School boards should involve the community, the professional staff, the classified employees and the students in a needs assessment so that the board receives all viewpoints, and knows how divergent groups perceive their needs and wants.
2. Goals and Priorities — The various methods of establishing goals and priorities should utilize the groups mentioned above. The final decision, however, is still the responsibility of the governing board. *Involvement* of all groups is essential to community acceptance. Board members must also be able to differentiate between a goal and an objective. The Legislature in the Education Code has defined these terms as follows:

Section 7562. "Goal" means a statement of broad direction or intent which is general and timeless and is not concerned with a particular achievement within a specified time period.

Section 7563. "Objective" means a devised accomplishment that can be verified within a given time and under specifiable conditions which, if attained, advances the system toward a corresponding goal.

The California School Boards Association has provided leadership on goals and objectives for several years. The Association has published documents on the subject, and on request will assist local boards to determine a process for setting goals, subgoals and priorities in the local district.

3. Alternatives — Usually there are alternative actions or programs that may be used to reach a specific objective or move toward a specific goal. Boards must also consider, however, the "constraints" involved. Such things as cost, time, personnel available, training and other factors should be reviewed.
4. Implement one of Alternatives — After an alternative has been decided upon, in modified form or not, it should be implemented. Good planning pays off, and careful implementation is critical to success.
5. Evaluate — This step brings closure and permits accountability. How well did the school or district meet the goals and objectives that were mutually agreed upon in Step 2? Did the students achieve the objectives? If not, why? Is more in-service training needed? Were the objectives too high? Too low? Based upon the evaluation, a new needs assessment is made and the cycle continues.

EVALUATION OF THE PROGRAM

Board members must evaluate the effectiveness of the instructional program as well as the teaching methods, materials and equipment utilized in carrying out the educational program. Various evaluation tools may be employed in determining the effectiveness of specific programs and aids.

Valid and complete information is essential if a board is to evaluate accurately and fairly.

Evaluation on a periodic basis is the key element of an accountability system.

For years educators have indicated that the purpose of evaluation is to improve instruction. It is much broader than that. Consider the definitions that follow and apply them to the classroom, the school, the district, and the state.

"Evaluation" is the science of collecting data and information and analyzing it for decision making.

"Decision Making" is making a choice between or among two or more alternatives.

Both long-range and short-range objectives should be set for the board, superintendent, certificated staff, classified employees and students. Deadlines or time lines can be developed for the accomplishment of these objectives and when evaluation shows they are not being met, the board should ask "Why?" Then attempts should be taken to establish a success pattern rather than applying punitive procedures.

Clearly-stated goals and objectives become more significant when districts have limited resources. Only when these are identified and made explicit can a board make *value* decisions and set *priorities*. Until a board begins to set priorities and allocate resources to meet student-learning needs, it is not performing its true policy-making or legislative function.

Accreditation

Accreditation is a process of self-study by a secondary school and of peer-evaluation by a visiting team through which the quality of the school's educational program is given formal recognition.

In order to qualify for accreditation, a school must have clearly defined and appropriate educational objectives; must have established conditions under which their achievement can reasonably be expected; should appear, in fact, to be accomplishing them substantially; and should be so organized, staffed and supported that it can be expected to continue to do so.

The school must determine its role and its responsibilities. Its primary responsibility is to its students. It must understand the needs, interests and abilities of each student, and, insofar as possible, provide a program that will challenge each one to the limit of his ability. In addition to curricular offerings, this program will include guidance services and co-curricular activities. It will certainly include, whether in formal instruction or otherwise, education in human values that favors the development of responsible citizenship.

The school also has a responsibility to the larger community it serves. It must not only reflect the values of this larger community, but also provide positive leadership in helping to preserve and update these values.

The school must continually appraise and define its goals in terms of the changing needs of society. This should be done by all those concerned with the school.

Specifically, the school will have:

1. A written statement of philosophy and goals, such statement(s) to be approved by the governing board of the school and put into effect by the administration. The statement should be specific enough to contain goals for each of the areas of responsibility mentioned above, as well as any other goals the school wishes to include. Further, it should be subject to constant and systematic critical analysis by the community, administration, staff, students, and governing board. There should also be a systematic and continuous evaluation of progress toward these goals.

2. A clearly defined organizational structure whereby these goals can be and are being carried out. This structure should specify: the functions of the administration, staff and students; the administrative relationships among these groups; and, the limits of authority and responsibility. Equally important, this structure should be demonstrably workable so that the working relationships and communication among all concerned are effective.

3. Student personnel services that identify the needs, interests and goals of all its students, and provide these students with adequate educational, career, personal and social guidance.

4. A curricular program with written course descriptions that provides all its students with a suitable course of instruction, in light of the school's philosophy and goals and the students' needs, abilities and interests.

   This implies the existence of adequate instructional resources needed for the curricular program and it assumes that there will be competent and enthusiastic teaching.

   The curriculum should be the object of continuous evaluation and development by faculty, students and administration. This process should bear not only on the nature, scope and effectiveness of individual courses, but also on their interrelationship in the curriculum as a whole, and on the relevance of the curriculum to the stated goals of the school.

5. Appropriate co-curricular offerings that supplement the formal instruction of the school. These should be responsive to the students' needs and interests and should draw upon special skills and enthusiasms among students and faculty alike.

6. A well-qualified staff that effectively carries out their responsibilities.

7. Financial support adequate to provide the necessary staff, physical facilities and other instructional resources.

   The school's budget should reflect the priorities derived from its philosophy and goals.

Needs of Minorities

You would no doubt be the first to say "all students have the right to a good education." But often unrecognized barriers to learning exist which discriminate against children because of their race, ethnic background, or socio-economic background. These children will not have full access to the educational opportunities provided at public expense unless school boards assume active leadership in removing the barriers.

Many of these children enter school unable to compete or even cope in the traditional classroom environment. For example, if children given instruction in a language they cannot understand and the textbooks in a language they cannot read, they are unable to benefit from the educational opportunities offered. Therefore, bilingual instruction is needed until they are able to function in English.

Language is not the only barrier. Children from a variety of ethnic backgrounds, from racial minority groups and low socio-economic backgrounds are at a loss in a school setting geared to middle-class Caucasian children.

Although the philosophy, objectives and educational commitment of a school district in the area of minority education cannot be separated from the overall educational system, there are some needs specific to ethnic and minority students that can be met by using available state and federal programs such as bilingual/bicultural education, early childhood education, educationally disadvantaged youth program, and ESEA (federal) programs. Other specific needs of minority children require programs developed at the district level.

Vital to the success of ethnic and minority students is in-service training of teachers and other personnel, including board members, in the history, culture and current problems of minority and ethnic groups. The Education Code, Sections 13344 to 13344.4, Article 3.3, requires in-service training of teachers in any school with a 25% or more minority population.

The students who constitute a measurable minority in a school district will vary from district to district. It is the responsibility of each local board to provide appropriate educational opportunities for the specific minorities in that district.

Adult Education Classes

Under certain conditions the governing board of any school district may establish adult education classes. School districts may receive reimbursement for adult classes from the state only when the classes have been approved by the State Department of Education. Elementary districts have only limited authority for the maintenance of adult classes.

Sex Discrimination

Recognizing and eliminating sex discrimination are important parts of an effective instructional program. It is your board's responsibility to promote a

positive self-image for *all* students, and to provide equal educational opportunities for *all* students. Because of past discrimination against females in many areas, this responsibility may require some remedial action on the part of your board. Developing an awareness of sex discrimination should be a priority, as should examining instructional materials for discrimination.

Sex discrimination refers to the attitudes and actions which relegate one sex to a secondary and inferior status in society. Sex role typing, a common occurrence in the classroom — is one form of discrimination because such typing insidiously assumes and asserts that one sex is incapable or unworthy of doing what the other sex does.

In school this role typing occurs in the teacher's selective reinforcement of student's personality traits, abilities, and interests according to her/his sex, in the directing of parts of the curriculum to one sex or another, and in the content of instructional materials. Such role typing may have the immediate damaging effect of repressing the natural talents of the individuals, and may do long term damage to the individuals and society by limiting ambitions.

Article 3, Chapter 1, Division 8 of the Education Code is designed to prevent discrimination and stereotyping of certain groups of people in textbooks. Section 9240 (a) says that instructional materials shall accurately portray the contributions of both men and women in all types of roles, including professional, vocational and executive. Section 9243 says that no instructional materials shall contain any matter reflecting adversely upon persons because of their sex. Legislation in 1974 further specifies that instruction in Social Science courses include significant contributions of women.

Compliance with these laws by the publishing companies is long in coming. Hopefully specific guidelines approved by the State Board of Education in October, 1974 will provide sufficient criteria for weeding out discriminatory materials.

Discrimination in educational programs or activities on the basis of sex will soon be prohibited by the federal regulation Title IX of the Education Amendments of 1972.

Because present conceptions of what constitutes "proper roles" for the sexes are based on what has been *traditionally designated* as male or female in behavior, personality and occupational roles, awareness of discrimination is difficult for many to attain. Yet, such awareness is necessary for the board member, for an effective instructional program must prepare students to deal with a future that will certainly require new modes of being for both sexes. How to attain an awareness of damaging role typing and discrimination is an enigma facing many board members.

Articulation

A prime function of a governing board in the instructional area is to establish policy which insures grade level and inter-school level articulation of the curriculum.

Articulation describes the relationship between various subject areas at the same grade level (horizontal articulation) or between the same subject area from one level to another (vertical articulation).

Horizontal articulation is essential for developing curriculum that focuses attention on what is being presented to the learner at a particular grade level. Vertical articulation focuses attention on careful planning in a particular subject matter field from one grade level to another.

In order to effect complete articulation, board policy should require certificated staff to develop a procedure to assure that existing and proposed programs take into consideration both horizontal and vertical articulation.

Additional Help for Boards

The CSBA Instructional Services Committee periodically mails "Update," a series of numbered letters about the instructional program, to all member boards. The numbered letters contain the latest information and instructional program trends, as well as guidelines and sample policies for local school board consideration.

On request of the local school board, CSBA will conduct mini-workshops for member boards and provide staff to assit in understanding and improving the instructional program.

Board-Superintendent Relationships

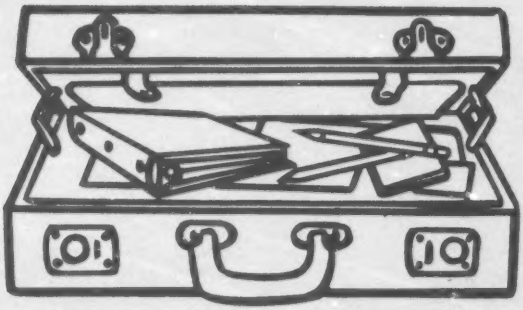
The strength of the school program lies in the superintendent's skill and the trust and understanding that exists between the superintendent and the school board. Harmonious relations are the result of a clear understanding concerning the functions of the superintendent and the board. As the school board makes policies and the superintendent implements them, communications between these two must be thorough.

Harmony establishes an atmosphere in which free discussions are encouraged and the adoption of defensive positions, difficult to abandon, is discouraged. Honest differences of opinion, however, must be openly acknowledged and constant efforts should be made to conduct the business of the district in ways that will not emphasize those differences or lead to antagonism, hurt pride or jealousies. Both the board and suprintendent need to be careful to give credit where credit is due and, when necessary, to admit errors. If split decisions are frequent and usually formed along identical membership lines, they should be considered as danger signals.

Superintendent Responsibilities

The broad general responsibilities of a superintendent can be summarized thusly:

- Assumes charge of the entire school system as the board's chief executive officer; coordinates the work of all departments; executes the policies of the board and recommends policies for the board to consider in improving the system and its educational service to the pupils and the community.
- Nominates all certificated and noncertificated employees; recommends for discharge any employees rendering unsatisfactory service within the limits of the law and board regulations; with his staff, assigns, directs and supervises



the work of all employees with due respect for any individual rights involved; proposes adequate salary scales for different classes of employees.

- With his/her staff, purchases approved textbooks and other instructional guides and equipment; schedules classes for the various types of training; assigns appropriate instructors for the various curriculum offerings; decides the general methods of instruction to be used; provides for the continuous revision of courses of study to meet changing conditions by appointing teacher and possibly citizen course-of-study committees and directing the work of any curriculum experts the system may employ.
- Presents a proposed annual budget and interprets it for the board; administers the budget after it is adopted and keeps expenditures within limits; provides for all possible economies that do not endanger educational results; directs the accounting of all school funds and makes proper financial reports to the board.
- Coordinates the planning of all educational features of new buildings or alterations of old buildings and counsels the architects in the general plans for such building erection; assigns caretakers to all buildings and maintains general supervision over their work; provides for needed experimentation in determining economical and otherwise efficient methods for building care and upkeep.
- Administers all schools and classes established by board action; directs the instruction, guidance, and discipline of all pupils; promotes organizations, such as student councils for training pupils in democratic and socially adjusted living.
- Coordinates a program for reaching the citizens of the community with adequate information about the activities of the schools, the reasons for the activities, and the results obtained; interprets the schools policies in talks before civic groups when called upon as time permits; works with parents' organizations and other groups interested especially in school welfare; fits himself/herself with his/her family into the civic, social and religious life of the community in a constructive way.

Many of the duties of the superintendent can, of course, be delegated to members of the administrative staff or others. The superintendent, however, is still the person accountable to the board of education for carrying out its policies or instructions whatever the degree of delegation the superintendent chooses. A thorough delineation of the division of responsibilities between the board of education and the superintendent is listed in the CSBA publication entitled "Board/Superintendent Responsibilities."

Support Your Superintendent

By the time an administrator has gained an understanding of the complexities of a community and its schools, the board has made a substantial investment in that administrator's experience. A well-functioning school system cannot change its superintendent without suffering at least some temporary loss of efficiency.

Since administrative skills are in great demand, other communities can offer both professional and financial inducements to lure a superintendent to a new position. Should this happen the board needs to weigh all of the costs of replacement as well as the investment in experience when considering the inducements that can be offered to hold him.

Occasionally pressures develop within the school system or within the community that make it difficult for a superintendent to function effectively. The results of a change preceded by strife and public criticism are damaging to a district.

Criticism may come from persons who are prejudiced, or only partly informed, or selfishly motivated, or it may come from parents who need a scapegoat for the failures of their offspring, or from teachers reluctant to adopt a woman or man it has come to respect. Complaints and criticism should be carefully investigated to assure the superintendent of timely information with which to guide actions. Superintendents should be protected from unjust criticism, including the efforts of articulate minorities to bring about his/her immediate removal.

Often four-year contracts are offered to superintendents to provide for stability and continuity of leadership. Just as important as the long-term contract is the climate of mutual respect and trust that should exist between the board and the superintendent. Confidence and gratitude should not be withheld from a satisfactory superintendent, for these normal by-products of a satisfactory relationship are often more important than any others in keeping a good person on a difficult job.

Evaluating Your Superintendent

After employing a superintendent, a board shares in the responsibility for that person's success. To do your share, you should make an effort to know more

about your superintendent, to help her/him work effectively and to maintain a harmonious working atmosphere.

To develop and maintain this kind of relationship a periodic review of the superintendent's responsibilities and a frank discussion of the superintendent's performance is necessary. Such evaluation is not only good personnel practice — it's legally required under the Stull Bill. (Education Code Sections 13485-13489, 13403 et seg.)

The evaluation should be based upon the views and expectations of the board as expressed in the goals and objectives of the school district and as set forth in the superintendent's job description.

Purposes of an Evaluation

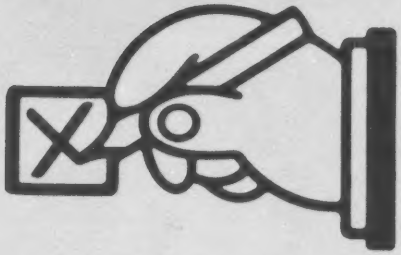
Evaluation is a valuable tool in establishing and carrying out the goals of any operation. Among the purposes of evaluating the superintendent are the following:

1. To establish and maintain good working relationships between the board and superintendent.
2. To define the functions and responsibilities of the superintendent.
3. To improve performance by suggesting areas of responsibility and operating techniques that may be strengthened.
4. To give encouragement and commendation for work well done.
5. To record some evidence of performance and improvement.
6. To offer a guide for the superintendent's self-appraisal of his own characteristics and skills.
7. To provide an opportunity for the board and superintendent to confer at periodic intervals on his/her performance.
8. To offer a procedure for comprehensive and dispassionate appraisal in a setting other than during times of crisis.
9. To establish reasonable standards for continued employment.

Guidelines for aiding your evaluation of the superintendent may be obtained from CSBA or ACSA.

Dismissal of Superintendent

If the school board begins to seriously question the professional leadership qualities of the superintendent, it is time for forthright talks between the board and its chief executive officer. These talks should be the first step toward corrective action as well as a better understanding of the nature of the problem. In some instances, the board may find the performance of the superintendent over the period of his/her contract to be unsatisfactory. If this occurs, the superintendent



should be informed and his resignation should be requested. Before such a decision is made, legal counsel should be sought by the board in order to protect the interest of both parties. It is required by law that six months notice be given to a superintendent prior to the end of her/his contract if that person is not to be rehired. If the six-months notice is not given, the contract will be renewed automatically for another year. Usually a superintendent, alerted to the dissatisfaction of the board, will find another position and will resign before she/he is dismissed or denied a contract extension. Refer to Education Code Section 938 for legal details concerning contract termination.

Retirement of the Superintendent

A clearly stated policy on the age of retirement should be established well in advance of the time it is needed. If departure from the policy is subsequently authorized, it should be clearly identified as an exception and strictly limited as to time. The least disruption of a school and community occurs when a superintendent resigns after training and working with the successor. When this is not possible, the board needs to be particularly specific in identifying the qualities required in the successor.

Selection of a New Superintendent

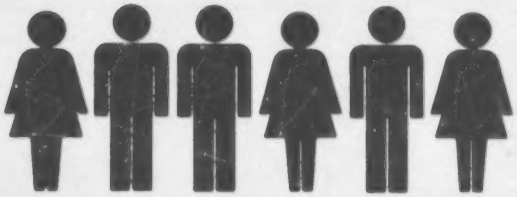
The selection of a superintendent is a matter of considerable importance. It is imperative that the most competent individual available be selected to administer the schools and to give leadership in development and improvement of the educational program. Careful preparation, definition of orderly and effective procedures, conformity with ethical practices, judgment and adequate financing are critical in recruiting and selecting a new executive officer. The decision will obviously affect the entire educational program of the district.

Legislation enacted in 1970, specified in Education Code Section 13142, provides that any governing board may waive any credential for the superintendent. The employment of a superintendent means more than hiring the services

of a professionally qualified person. It also means acquiring that person's philosophy, set of values, system of practices, and approach to public education.

School boards should be willing to invest much time and effort in the search for an educational leader.

Board members faced with the selection of a new superintendent should review the material outlined in the publication "The Superintendent/Board Relationship," published jointly by the California School Boards Association and the Association of California School Administrators.



The Management Team and Participatory Management

Many schools today are developing what is called, "the management team" approach to school administration.

The management team is composed of administrators who have been designated as management personnel by the superintendent and approved by the board. In many districts, management team personnel involve all the administrators down to the school site principal.

Through an administrative procedure developed by the district board, management personnel meet with the superintendent; and the policy positions that are recommended to the board are the result of a group-decision process.

In addition, participatory management calls for the involvement of classroom teachers, school psychologists, librarians, food services personnel and other employees where areas of their expertise are under consideration for the possible development of district policy.

9

Providing for Good Staff Relationships

The school board has the responsibility to establish the policies and marshall the resources necessary to attract and maintain a competent staff.

Employment of Staff

The superintendent with assistance from other members of the administrative staff recommends candidates to the board for teaching and other positions in the school system. The board may accept or reject any of the superintendent's recommendations. If rejected, the board should then request the superintendent to submit new recommendations. Rejection should not result in independent initiative on the part of the board or one of its members to propose candidates, or in the appointment of a person who has not been given prior approval by the chief executive. However, only the board has the legal authority to contract with employees.

In selecting new personnel, the board should adopt as policy the job specifications for each position.

Education Code Standards for Staff

Although it is the responsibility of the local school board to hire qualified personnel for the school district, the state law requires certain standards which must be met. Division 10 of the Education Code delineates all the provisions applying to employees in "education positions" or "positions requiring certification qualifications."

- Administrators

  The school board has authority under Section 935 of the Education Code to employ a district superintendent for one or more schools if the district employs eight or more teachers. If the district has an ADA of 1,500 or more

pupils, the board may employ such deputy, associate, and assistant district superintendents as deemed necessary.

Minimum requirements for standard administration credentials are outlined in Education Code Section 13197.2. The credential permits the holder to serve in the capacity of associate, assistant, and/or deputy superintendent or in any equivalent or intermediate level administrative position including principal of a school. The 1970 credentialing law enables school boards to waive the credential requirement for its chief administrative officer. Education Code Section 13142 notes the waiver and states, "Any individual serving as the chief administrative officer of a school district who does not hold a credential may be required by the local governing board to pursue a program of inservice training."

Administrative officers such as business manager, supervisors of buildings and grounds, and directors of facilities may be either certificated or noncertificated employees.

Administrators are not covered by tenure law unless they had gained tenure in the district as a teacher prior to becoming an administrator. Administrative positions are generally on a contract basis.

- Teachers and Other Certificated Employees

All teachers must hold valid credentials as outlined in the Education Code. Application for credentials may be made to the State Department of Education with a subsequent evaluation of the type of credential to be issued.

Teachers are employed by the school board and must be notified prior to March 15 if, for some reason, they are not to be employed for the following school year. If by June 10 the board serves upon a permanent employee both a copy of the Education Code Section 13260 and a request for notice of his/her intention to remain or not to remain in the employment of the school district for the following year, the employee must notify the board by July 1 of his/her intention.

Teachers may be classified into one of four categories: permanent, probationary, substitute, or temporary.

Permanent teachers are those who are employed in a district having an ADA of 250 or more, who have been employed for three consecutive school years in a probationary position and have been reelected for the succeeding year. In districts of less than 250 ADA an employee, after having been employed by the district for three complete consecutive school years in a position requiring certification qualifications, and rehired to a position requiring certification for the following year, may be classified as a permanent employee of the district. If the classification is not made, the employee shall not attain permanent status. (Education Code Section 13307) In districts with 60,000 or more ADA, tenure can be granted after an employee has served two consecutive years.

- Classified Employees

A very important segment of the school staff is composed of personnel who keep the school in operation through handling clerical, custodial and maintenance duties. Board members will be wise to discuss school plant operations with such personnel in addition to visiting classrooms to observe teaching personnel. Job descriptions for classified personnel should be adopted by the board and filed in the district office in order that a clear understanding exists between the parties pertaining to positions and work requirements.

Board members should familiarize themselves with sections of the Education Code which require a classification of positions and employees in the classified service, require employment contracts, specify work week, overtime and salary practices, prescribe leave and absence policies, and fix certain other fringe benefits for employees in classified service.

Probationary teachers are those who have a contract for the school year and are not classified as either permanent, substitute or temporary.

Substitute teachers are persons actually employed to fill positions of regularly employed teachers absent from service.

Temporary employees are employed to serve from day to day during the first three school months of any school term to teach temporary classes not to exist after the first three school months of any school term or to perform any other duties which do not last longer than the first three school months of any school term. If the classes or duties continue beyond the first three school months, the certificated employee, unless a permanent employee, shall be classified as a probationary employee.

Provisions for sick leave and other fringe benefits are outlined in the Education Code, beginning with Section 13468.1 and in policies delineated by individual school districts.

Merit System

The most rapidly growing single system of employment for classified employees in California is the merit system. Essentially the merit system is a civil service type program authorized under the Education Code beginning with Section 13595. Local districts having over 3,000 ADA must adopt the merit system if a majority of the classified employees vote in favor of having such a plan. Approximately 100 school districts in California presently operate under the merit system.

The code provides that a personnel commission be established to implement the merit system. The merit system provides for a high degree of organizational independence for the personnel commission and its staff. The personnel director reports to the commission, is selected by the commission and is intended to be independent and free from the jurisdiction of the superintendent and board. A wise superintendent and an astute board will, however, strive to keep the lines of communication open at all times with the personnel commission and will work toward harmonious relationships, calling at times for joint meetings to review common problems and concerns.

The word "merit" applies to the process of selection and promotion of the employee rather than to the salary and wage aspects. Provisions of the merit system require the personnel commission to conduct salary surveys and to recommend salary schedules which will provide for like pay for like work. It also implies that school district employee wages must be competitive with like positions in the surrounding community.

The personnel commission for the merit system is unique in that only one member of the commission is appointed by the governing board of the school district with two members being appointed by state officials. The commission establishes its own budget independent of, and without control from, the board of education. The commission must hold a public hearing of its budget and provide the board of education with opportunity to comment on the budget. However, the only review or control over the personnel commission budget is that exercised by the county superintendent of schools. The superintendent can either approve or reject the budget. She/he cannot modify it. If rejected, it remains the same as the previous year.

There is one basic theory which should be kept in mind whenever a school board member is considering the authority of the commission as contrasted to the authority of the board of education. Namely, the power to establish procedures to be followed in the classified service is vested in the commission but the power of substantive action and execution is vested in the board of education. The personnel commission is vested only with those powers specifically assigned to it in the merit system section of the code and all other powers pertaining to the operation of the local school district are the perogatives of the school board.

Salaries/Fringe Benefits

Basic to the development of all personnel policies is the provision of an adequate salary schedule. Such a schedule should be developed and reviewed periodically by teachers, the school administration and the board of education. The same holds true for the classified personnel salary schedule.

The salary schedule for teachers should provide a beginning salary that will allow even the new and inexperienced teachers to live comfortably and should provide for a maximum salary that is high enough to encourage competent teachers to remain with the school system on a true career basis. Salaries should be based on professional preparation, experience, and qualifications and not on the level of educational program (elementary, junior high or senior high) to which the teacher is assigned.

Board policy should recognize rights of tenure, sick leave, bereavement leave, and retirement benefits which California statutes grant to certificated and classified personnel. Improvement of these benefits should be considered by the board when district finances make it possible. Additional information can be found in the Education Code beginning with Section 13468.

Conditions of employment for classified personnel are covered by Sections 13580 to 13768 of the Education Code and should be carefully studied by school boards.

Employer-Employee Relations — The Winton Act*

Employer-employee relations in local public school districts in California are governed by the "Gordon H. Winton, Jr., School Employer-Employee Relations Act or the Winton Act." This law contained in Sections 13080-13098 of the California Education Code, was first enacted in 1965 and extensively amended in 1970 by the California Legislature.

* Thomas A. Shannon, Schools Attorney

In brief outline form, the "Winton Act" may be summarized as follows:

1. *Applicability*. Applies both to certificated and classified employees of public schools.
2. *Purpose*. To promote improvement of personnel management and employer-employee relations and establish a statutory basis for public school employee representation.
3. *Right of Individual School Employee to Join Organization or Represent Self*. A school employee has right to form, join and participate in activities of employee organizations of own choosing *or* to refuse to join or participate in activities of such organizations.
4. *Interference with Right of School Employee to Join Organization or Represent Self Prohibited*. Both school board and employee organizations are prohibited from interfering with, intimidating, restraining, coercing or discriminating against public school employees because of their exercise of right to join *or* refuse to join employee organizations.
5. *Scope of Representation*. For both certificated and classified employees and employee organizations, it includes all matters relating to employment conditions and employer-employee relations, including, but not limited to, wages, hours and other terms and conditions of employment. In addition, for certificated employee organizations only, scope includes procedures relating to definitions of educational objectives, determination of course content and curricula, textbook selection, and other aspects of instructional program to extent such matters are under legal control of school board.
6. *Type of Representation*. A school board may represent itself or designate any person to represent it. Certificated and classified employee organizations may select own representatives in any way they see fit to "meet and confer" with school board representative; however, where more than one *certificated* employee organization exists, school board representative must "meet and confer" with certificated employee organizations exclusively through "Certificated Employee Council," which represents all certificated employee organizations. Composition of "Council" is set forth in "Winton Act."
7. *"Meet and Confer" Process Defined*. Upon request, school board representative must "meet and confer" on all matters within scope of representation. In such process, both school board and employee organization representatives have mutual obligation to exchange freely information, opinions and proposals and to make and consider recommendations in a conscientious effort to reach agreement.
8. *Written "Agreements."* The "Winton Act" does NOT contemplate bilateral collective-bargaining type agreements; rather, any courses of action

agreed upon in "meet and confer" process are implemented by the school board unilaterally enacting a resolution, regulation or policy adopting such courses of action. Also, it should be noted that school boards and employee organization representatives are NOT required by law to reach agreement; rather, they are required only to make a "conscientious effort" to reach agreement.

9. *Inability to Reach Agreement in "Meet and Confer" Process.* If there is "persistent disagreement" between school board and employee organization representatives, the issue is considered either (a) under a procedure to resolve the "persistent disagreement" which was developed jointly by the school board and employee organization representatives, or (b) by a tripartite panel with one member selected by each party and third member selected by both parties. Any findings or recommendations made to resolve "persistent disagreement" are strictly *advisory* only and do not bind the parties.

10. *Grievance Procedure.* Adoption of a "grievance procedure," which provides orderly process by which employees may test validity of application against them of existing school board policy, is not required under law; however, a school board has general legal authority to adopt such process provided final decision in any dispute remains with school board.

11. *Wage Proposals Are Public Records.* Employee organizations must make initial proposals at public school board meetings and all proposals thereafter are public records.

12. *Executive Session Preparation for "Meet and Confer" Process.* School board may meet in closed "executive session" to instruct its representative on its position relating to employee salaries and fringe benefits. (California Government Code Section 54967.6)

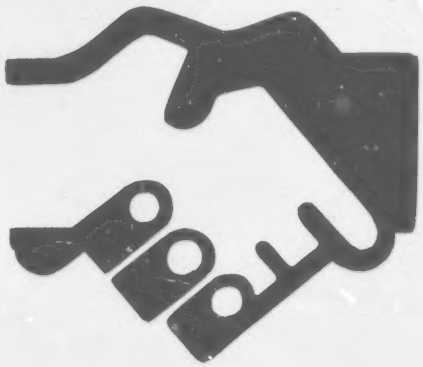
13. *Community College Academic Senate.* "Winton Act" does not restrict, limit or prohibit community college academic senate in making recommendations to Community College Board of Trustees or college administration on "academic and professional matters."

14. *No Right to Strike.* California case law holds that concerted strikes, work stoppages or slowdowns by public school employees are illegal and may be enjoined by Order of the Superior Court, upon proper application by school board.

15. *Primacy of School Board.* The "Winton Act" specifically contemplates that the school board has the legal right and duty to make the "final decision with regard to all matters" under consideration in the "meet and confer" process. Moreover, nothing in the "Winton Act" limits or restricts the discretionary authority of a school board under law to take any legislative ac-

tion it deems appropriate and necessary as the governing board of a public school district.

The spirit and intent of the Winton Act properly require employers to expend every reasonable effort to bring teachers into the decision-making process without surrendering the final legally-mandated, decision-making authority of the school board. Board members should take advantage of workshops conducted by CSBA on the topics of meet and confer/negotiations; persistent disagreement, and grievance processing. Reading materials are also available from CSBA on these topics as well as consultative assistance upon request.



Promoting Good Will

The school board can do much to promote good will and understanding between the board and the staff of the district. Teachers and classified personnel should be invited to attend board meetings and should become familiar with board operations. Some districts schedule "rap" sessions with employees to develop a better understanding of the problems faced by staff personnel. These small group meetings between the board and staff are excellent opportunities to discuss educational aims and purposes as well as ideas for future policy changes in curriculum and operations.

A demonstrated interest in the financial and professional security of school employees is important. Of prime importance is the board's personal interest in their worth and welfare. The feeling of being appreciated, of being respected as a worthy partner in the work of the school and the community, is a reward which any school board can afford to give to its employees. Research in human relations shows such reinforcement to be essential to productivity and high morale in any organization.

Affirmative Action Policy

State law prohibits discrimination or the denial of an opportunity to serve the schools on account of marital status, residence, political affiliation, religion, sex, or race. Such law coincides with CSBA Affirmative Action Policy which states, "It shall be the policy of CSBA to support the providing of equal opportunity in employment for all persons and to prohibit discrimination based upon race, sex, color, religion, age, physical handicap, ancestry, or national origin in every aspect of personnel policy and practice in employment, development, advancement, and treatment of employees, . . ." In addition, CSBA recognizes that it is not enough to proclaim that public employers do not discriminate in employment, but that one must also strive actively to build a community in which opportunity is equalized, and that the employer must make additional efforts to recruit, employ, and promote members of groups formerly excluded; therefore, CSBA policy continues ". . . and to promote the total realization of equal employment opportunity through a continuing affirmative action program."

Inservice Training

The continued professional development of the staff is essential. Your superintendent and staff should outline a program which may include workshops, planning sessions, special assignments, individual and group research and employment of professional consultants in curriculum and methodology to conduct inservice training. Board policy should recognize and encourage the inservice growth of the staff, by official recognition, promotion and the provision of an adequate salary schedule. Funds should be delegated in the budget for programs which will assist employees in understanding and handling their duties more proficiently.

School districts need to develop formal training programs for their various employees and encourage them to develop skills which will enable them to reach their potential. Education Code Sections 13453 and 13454 authorize governing boards to grant leave of absence with or without pay in order for certificated personnel to do graduate work, travel or embark on other programs which will improve their skills in working with students. Boards are expected to be able to demonstrate that leaves so authorized are in the public interest or in the performance of a district service "for the benefit of the school and pupils," and not solely for the benefit of the individual involved. Clauses frequently are inserted in contracts for developmental leaves requiring refunds if a stipulated service to the district is not performed.

Evaluation — The Stull Bill

Based on the public's demand for accountability in the public school system, boards have the right and the responsibility to see that both the educational program and the district staff are adequately evaluated on a periodic basis.

The Stull Bill (Education Code Sections 13485-13489, 13403, et seg.) has made an impact on evaluation procedures, particularly those affecting teachers. Specific evaluation and assessment guidelines for teachers and other certificated employees adopted by the school board must include:

1. the establishment of standards of expected student progress in each area of study
2. techniques for the assessment of that progress
3. assessment of certificated personnel competence as it relates to established standards
4. assessment of other duties normally required to be performed by certificated employees in addition to their regular assignments
5. the establishment of procedures and techniques for ascertaining that the certificated employee is maintaining proper control and is preserving a suitable learning environment.

The evaluation must be in writing and transmitted to the certificated employee 60 days before the end of the school year in which evaluation takes place. Probationary certificated employees shall be evaluated at least once each year and tenured certificated employees at least once every three years.

The requirements of the bill pertain with equal force to school administrators at all levels, up to and including the superintendent. The evaluation and assessment guidelines applicable to school administrators may assume important legal significance in future cases involving their transfers and demotions.

The Stull Bill stresses that evaluation and assessment guidelines for certificated personnel must include adequate provision for followup counseling. If followup counseling is to be accomplished adequately, the evaluation process must begin at the start of each school term. The importance of promptness in initiating the evaluation process early in the school term is particularly crucial in the case of probationary teachers because they must be notified no later than March 15 if their services are not required for the ensuing year.

It is expected that effective implementation of the Stull Bill will result in better evaluation of the professional performance of teachers and other certificated employees. It will also result in less cumbersome methods for removing deficient instructional personnel from the schools without placing such personnel in peril due to unfair or inadequate procedures for arriving at the truth.

Dismissal — Certificated Personnel

A permanent teacher may be dismissed for cause, because of a decrease in pupil enrollment, or because the particular service for which the employee was engaged is abandoned. Boards seeking to dismiss permanent teachers should obtain legal counsel. Causes which provide grounds for dismissal include im-

moral or unprofessional conduct; commission, aiding or advocating the commission of acts of criminal syndicalism; dishonesty; incompetency; evident unfitness for service; physical or mental condition unfitting him to instruct or associate with children; persistent violation of or refusal to obey the school laws of the state or reasonable regulations; conviction of a felony or any crime involving moral turpitude, and knowing membership in the Communist Party.

The governing board may, upon majority vote, give notice to the permanent employee of its intention to dismiss him at the expiration of 30 days upon the filing of written charges stating that there exists cause for dismissal. Any written statement of charges of unprofessional conduct or incompetency shall specify instances of behavior and the acts or omissions constituting the charge so that the teacher will be able to prepare his defense.

If the employee does not demand a hearing by filing a written request for a hearing with the governing board, he/she may be dismissed at the expiration of the 30-day period. In the event a hearing is requested by the employee, the hearing shall be commenced within 60 days from the date of the employee's demand for a hearing.

10

School Facilities

Some of the most time-consuming responsibilities of school boards are those relating to the management of school plants and the need for providing adequate classroom space to house student populations. Enrollment generally is dropping in most school districts and many school boards are faced with the loss of ADA and the prospect of closing some schools. The problems of school plant management and planning are also acute in communities with schools that are earthquake hazards and must be replaced.

Planning for new school plants, additions to existing plants, and replacements are technical problems to solve. A school board has the responsibility for the development of a master plan so that the needs of the school district for a predictable period in the future can be considered. Piecemeal construction without adequate planning may result in some permanent but ill-advised commitments for the future.

School boards in larger school districts should have divisions of school plant planning or departments of research which keep them informed of needs and

constantly advise them of trends and developments. Long range planning for site acquisition and land use is desirable. Maintenance departments in the larger districts should be closely associated with the planning department so that planned programs of preventive maintenance can be followed to reduce the need for costly major rehabilitation.

Bonds

The traditional method of obtaining money to construct school facilities is bonding. Included under the term facilities can be the acquiring of school sites and buildings, making alterations or additions to school buildings, restoring school buildings damaged by calamity, furnishing and equipping school buildings, making permanent improvements to grounds, and refunding outstanding bonds.

An election is required to obtain approval from the electorate to sell bonds in the amount required. A two-thirds vote of approval is necessary, as stated in Article XIII Section 40 of the California Constitution.

> "No . . . board of education, or school district, shall incur any indebtedness or liability in any manner or for any purpose exceeding in any year the income and revenue provided for such year, without the assent of two-thirds of the qualified electors thereof . . ."

The amount of the bond sales of any school district cannot exceed the bonding capacity of the district which is set at 5% of the assessed valuation for a high school district, 5% of the assessed valuation for an elementary district, and 10% of the assessed valuation for a unified school district.

Bonds are paid out of tax revenues collected by a property tax set for that purpose. Section 21701 of the Education Code provides that the governing board of a school district may call a bond election whenever it is deemed advisable. Upon receipt of a petition signed by a majority of the qualified electors of a school district, the governing board is required to call a bond election.

State Loans

California school districts which have bonded themselves to the legal limit without being able to provide enough classrooms may qualify for state aid in building additional schools. A district may borrow funds from the state to finance school construction through the School Building Aid Law as set forth in Division 14 of the Education Code.

Under the standard loan program, a school district is required to first bond to capacity in order to become eligible for a state loan. An election must be held with a two-thirds vote of approval. Certain restrictions are placed upon the state money regarding square footage and cost allowances and the purposes for which the money may be used.

Field Act (Fitness of Buildings for Occupancy)

In 1933 the legislature established earthquake standards for the design and structure of new school buildings. Each school district governing board is to have adopted a plan for the orderly repair, reconstruction, or replacement of existing school buildings not meeting earthquake standards. The repairing or replacing is to be completed by 1975. An existing building, below earthquake standards, may be used past 1975 only if a contract has been awarded for the repair or replacement of the building. That extension terminates upon the completion of the contract or July, 1977, whichever comes first.

In 1972 a constitutional amendment was passed permitting bond money to be raised to repair, reconstruct, or replace public school buildings determined to be structurally unsafe for school use on a simple majority vote of the electorate. The two-thirds vote requirement for other bonds remains unchanged.

Sites

Sites must be secured with the knowledge that they will be utilized for school purposes over a long period of time. Therefore, adequate forecasts of future developments within the district are necessary. The board has the authority to purchase school sites, but title to the property may not be acquired by the board until the State Department of Education has pronounced on the adequacy of the site. If the Department of Education judges the site to be inadequate, the district may not acquire title. However, if school district funds alone are to be used for site acquisition and construction, the board may acquire title after a thirty-day waiting period. City unified school districts need not request a recommendation from the State Department of Education. However, all school districts *must* request a recommendation if the proposed site is within two miles of an airport.

The governing board, before acquiring title to property for a new school site or for an addition to a present school site, must give the planning commission having jurisdiction notice in writing of the proposed acquisition. The commission will investigate the property and report to the board within 30 days. If the report does not favor the acquisition of the property, the board shall not acquire title to the property until 30 days after the commission's report is received. The planning commission may appeal the board's decision through the courts only on the grounds that the decision is capricious or arbitrary.

Pay As You Go Financing (Tax Overrides)

Tax override money can be used to finance school facilities. An election must be held and a majority vote is required to approve an override tax rate for a fixed number of years. Since only a limited amount of money can be generated each year by this method, only small construction projects could be undertaken.

Lease Purchase

Lease purchase of facilities by a governmental organization came into existence in the State of California in 1950 when the State Supreme Court ruled that a lease purchase contract does not violate the debt limit provision of the California Constitution, stating:

> "It is evident that the contract did not create any liability at the time it was executed, except a contingent future liability . . . and a sum payable upon a contingency is not a debt until the contingency happens."

School districts are authorized to enter lease and lease purchase agreements for permanent facilities. The maximum term of such lease is 40 years. An election must be held at the time of the primary or general election to authorize the district to enter such an agreement.

Districts may enter certain lease and lease purchase agreements for facilities *without a vote* of the electorate. The most significant authorization is Education Code Section 15352 which authorizes the lease of temporary or portable buildings for a maximum period of 7 years, provided that such buildings must meet the Field Act requirements if leased for more than 3 years.

The Education Code also authorizes districts to lease certain types of equipment and supplies without a vote of the electorate.

In 1974 a bill signed into law provided an alternative method of financing public school facilities involving the establishment of a private nonprofit corporation to issue lease rental revenue bonds for construction of a facility. The nonprofit corporation in turn leases the facility back to the school district.

Such securities are exempt from the California State income tax and such securities are eligible to secure bank deposits. The net effect is a reduction in the cost to a district of lease purchase agreements.

There is also a maximum limitation on the amount of money which a district may commit to a long-term lease purchase agreement.

Elections for lease purchase agreements may be held at the time of a statewide general or primary election or on an election date specified in Section 2504 of the Education Code.

A district may consolidate several lease purchase proposals on a single ballot proposition. The district may also decide not to lease one or more of the buildings included in the ballot proposition.

Lease of Facilities not Requiring Vote

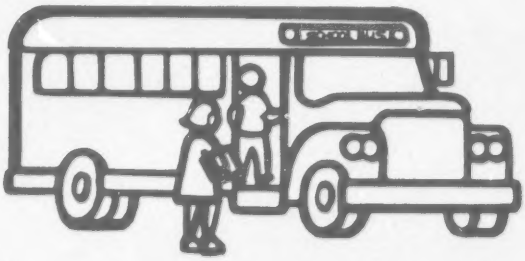
A temporary use building or a building classified as a relocatable structure may be leased by the district without requiring a vote of the electorate.

A "Temporary Use Building" is defined as a building for which the intended

use is for a maximum of three years from the date of first occupancy. Such building need not meet Field Act requirements.

A "Relocatable Structure" is defined as a building that is capable of being readily moved. Districts may lease such buildings for a maximum of 10 years. Such structures must meet Field Act requirements.

A governing board may designate a building which is primarily used for other than public school purposes as an "*offsite location*" for the purpose of conducting educational programs as prescribed by the governing board.



Leasing of Equipment

A district may lease equipment, including school busses, other motor vehicles, test materials and audiovisual equipment and all other items defined as service systems in the California School Accounting Manual.

The term of such lease or lease purchase agreement, including renewals, shall not exceed the useful life of the item and in no event shall exceed 10 years.

Contracts may be renewed at the end of each term at a rate of not more than 7 percent annually above the rate set in the existing agreement.

School Construction

A governing board has the authority to build school buildings at its discretion, provided that the necessary funds are available, or it may be directed to do so by a vote of the qualified electors of the district. However, when construction or remodeling involves facilities which will be occupied by children, quite exacting procedural requirements have been established which must be followed to avoid any liability of board members. They include the following:

1. The job is subject to a plan check for structural and fire safety and general field supervision by the State Division of Architecture and Construction.
2. The district must employ a licensed architect or engineer.

3. Non-city districts and districts using state or federal funds are required to secure approval of plans from the office of School Planning of the State Department of Education.
4. Non-city districts are also required to secure the approval of the County Superintendent of Schools.
5. All districts are required to have plans checked for structural safety and approved by the Division of Architecture. (Ed. Code Section 15454)
6. All districts are required to employ an inspector who is responsible for continuous inspection during construction.

Securing and Accepting Bids

Prior to letting a contract for construction of a school building, the governing board must secure written approval of the plans from the State Division of Architecture and from the State Department of Education. Non-city districts must secure approval of the County Superintendent as well. The preparation of all contract documents are the responsibility of the district architect and he/she normally aids the district in the advertising, receiving and opening of bids for school construction. It is the board's decision to accept or not accept such bids and to award the contract.

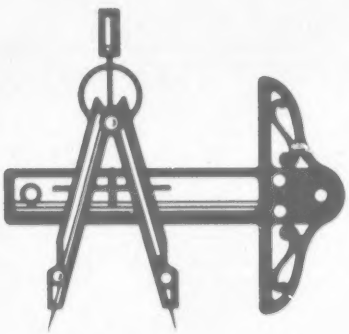
To be valid, contractural obligations must be executed by the governing board, or, if execution is delegated to an agent, they must be ratified by the board. The governing board may not enter into contracts in excess of the balances and money accruing to the district and usable during the school year for which the contracts are made.

It is against the law (Ed. Code Section 1174) for a board member to be financially interested in any contract made by the board. This prohibition is qualified under certain circumstances such as the holding of less than 5% of the stock of a corporation, provided the interest is disclosed and recorded in the minutes. In districts of fewer than 70 pupils in average daily attendance, a board member may be compensated for necessary work or supplies provided in behalf of the school district (Ed. Code Section 1176.5). In case of doubt, check with the district's legal adviser.

The governing board of any school district must let any contracts involving an expenditure of more than four thousand dollars ($4,000) for work to be done or more than eight thousand dollars ($8,000) for materials or supplies to be furnished, sold or leased to the district, to the lowest reponsible bidder who must give such security as the board requires, or else reject all bids. Ed. Code Section 15951 applies to all materials and supplies whether patented or otherwise.

The purchase of books, workbooks and educational films is not subject to bidding procedures. A school district may also make purchases from other governmental agencies without a call for bids. For purchases or contracts involving

lesser sums, bids are not required. Experience has shown, however, that substantial savings generally result from larger orders and competitive bidding.



Architect's Responsibility

When employing an architect, the school board should secure the person who will, in its estimation, provide the most competent technical services in a fashion that is harmonious with the needs and desires of the community. In helping the architect get started, the school board has the responsibility to give her/him specific instructions concerning both the educational specifications as well as the financial limitations that will serve as a framework within which he/she must work. The educational specifications must include consideration of the educational program of the school, as well as consider the educational needs and desires of the community.

The school board should delegate to the administration the task of supervising the work of the architect, and after contracts for construction are made, the board is required by law to employ an inspector or clerk to assist in the supervision of construction.

More Than Board Majority Vote Required

Most of the motions dealing with the purchase, sell, and lease of property require more than a majority vote by the board of education. Appendix D lists some of those transactions requiring more than a majority approval by the board.

11

California's Community Colleges

California's Community Colleges, among their vast variety of educational services, have the responsibility for conducting programs for Grades 13 and 14.

Two-Year System Created

Two-year colleges were established in California in 1907 and have since increased to 100 campuses in 70 Community College Districts. Our colleges constitute a vital segment of higher education in the state, providing training in three specific areas: (1) standard collegiate courses for transfer to four-year institutions, (2) vocational-technical courses, and (3) general or liberal arts courses. Studies in each field may lead to the associate of arts or associate in sciences degree.

Community Colleges Emerge

In 1970, the junior colleges in California were renamed Community Colleges. Until 1960, the two-year colleges were administered at the state level by the State Board of Education. However, the Donahoe Higher Education Act placed the state colleges under a board of trustees, and defined the California system of higher education as consisting of three segments: the University of California, the California state colleges, and all Community Colleges. The junior colleges then remained the only segment tied to the secondary education system and the Board of Education.

Board of Governors Created

In 1964, a Senate fact-finding committee decided to create a separate state governing board for the Community Colleges. The Board of Governors of the California Community Colleges were created in 1967 by enactment of Chapter 1549.

The concept of local autonomy is a very important aspect of the Community college system. At present, the state provides approximately 42% of the financing of the Community College system, but the Community College Districts themselves are governed by local boards. Local control and support ensures that the Community Colleges are responsive to the desires and needs of the residents of the region.

Section 196 of the Education Code states the position of the Legislature when it created the Board of Governors of the California Community Colleges:

> "It is the intent of the Legislature that the Board of Governors of the California Community Colleges shall provide leadership and direction in the continuing development of Community Colleges as an integral and effective element in the structure of public higher education in the state. The work of the Board (B.G.C.C.C.) shall at all times be directed to maintaining and continuing to the maximum degree permissable, local autonomy and control in the administration of the Community Colleges."

The Board of Governors of the California Community Colleges is composed of 15 members appointed by the Governor and ratified by the Senate for four-year terms. The role of the Board of Governors involves a delicate balance between state leadership and local control.

Community College Chancellor's Office

The Community College Chancellor's Office, with 94 employees, is temporarily located at 1530 Capitol Avenue, Sacramento, California. New offices are being built at 1238 'S' Street, Sacramento, California 95814. Dr. Sidney W. Brossman is the Chancellor for the California Community Colleges.

Powers of the Board of Governors

In 1969, the Legislature delineated the power of the Board of Governors relative to the powers of local governing boards. Section 200 of the Education Code states: "By enacting this article, the Legislature declares its intent to specifically delineate the powers, duties, and functions of the Board of Governors of the California Community Colleges; and the powers, duties, and functions of the local district governing boards operating junior colleges." Section 200 of the Education Code also says that the intention was to establish functions, not legal provisions. The 1969 statutes also enumerated the several permitted functions of the Board of Governors.

The California Community Colleges have been considered a system of Post-secondary Education in California since the development of the "Master Plan for Higher Education" in 1959-60. California's Community Colleges constitute the largest segment of higher education in terms of students enrolled, approximately

1 million, and campuses in existence, 100. It was the size and rapid growth of the Community Colleges which gave impetus to the creation of the Board of Governors and the Chancellor's Office in 1967.

Accreditation

Accreditation is a process of self-study by a college and of peer-evaluation by a visiting team through which the quality of the college's educational program is given formal recognition.

The resulting institutional accreditation by the Commission assures the educational community and the general public that the institution has appropriate and clearly defined educational objectives, has established conditions under which their achievement can reasonably be expected, and appears to be accomplishing them and is so organized, staffed and supported that it can be expected to continue to do so.

The guidelines for self-study ask the College to:

- describe clearly the functions it intends to perform and the educational goals and objectives it seeks,
- develop a description of institutional practices in the area of the criterion,
- produce evidence that the description is accurate,
- assess the effectiveness of its practices,
- describe the college's future plans and objectives in the area, and
- tell what plans are underway for realizing the objectives of the College.

After such self-study: an evaluation team of peers (faculty members, administrators, counselors, classified employees, Board members) visits the college for three full days of conferences, interviews, class visitations, and assessment of all facets of program and management. Many colleges are involved with national associations accrediting specialized programs (nursing, engineering, technical programs, etc.). Such specialized accrediting can be coordinated with the self-study and visitation, to reduce duplication of effort.

Accreditation is without limit of time unless terminated. However, institutions are reviewed periodically, normally five years after the initial accreditation, and ten years thereafter. In the fifth year of the ten-year cycle, the institution must prepare a comprehensive self-study report and submit it to A.C.J.C. Should an institution undergo a substantive change or if its educational effectiveness is questioned, A.C.J.C. may make a special review. If an evaluation team indicates areas of concern, a special report and/or an interim visit may be requested. Prolonged inability, for whatever reasons, to conduct its academic programs will require a review of the institution and a reconsideration of its accreditation.

Criteria for self-study and for evaluation are established in these areas:

Functions and Objectives, Curriculum, Instruction, Faculty (competence, dedication, morale, etc.), Student Personnel Services, Community Services, Learning Resources, Staff Development, Physical Plant and Equipment, District and College Governance.

(These criteria are explained in detail in the Manual of Accreditation for Junior Colleges, adopted by the Accrediting Commission for Junior Colleges in June, 1973.)

Accreditation by such self-study and peer evaluation is a useful tool for the Governing Board of the College District. Through the appraising evaluations in each area of the programs, management and services of the College, the Board can assess and evaluate the needs and the practices. The self-study provides in-depth perception, and the team evaluation provides outside peer appraisal.

Community College Finance

Early History

California has provided state support for Community Colleges since the first campus was established in Fresno in 1910. In 1921, the Legislature authorized the establishment of separate Community College Districts and provided for an allocation to these districts of a flat sum of $2,000 per year, plus $100 for each unit of Average Daily Attendance (ADA), if an additional $100 were provided from local funds.

In 1935, the Legislature reduced the $100 per ADA to $90, and in 1937, established a maximum district tax rate of $0.35 for Community College programs. State support remained at this level until 1946. Based on constitutional amendments, the Legislature, in 1947, established new laws providing for state support based upon a foundation program. The foundation program provided for $200 per unit of ADA, with the state to contribute the difference between the proceeds of a local $0.20 tax and the $200. This legislation provided the foundation program concept under which the Community Colleges presently operate including the following components: district aid, basic aid, and equalization aid. There have been gradual increases in the foundation program and computational tax.

In 1953, legislation was adopted to provide for the separation of the ADA of regular classes and classes for adults, and also to limit state aid for classes for adults to a maximum of $80 per ADA. In 1954, the Legislature established two categories of students: (1) those over 21 years-of-age enrolled in fewer than 10 class hours per week (defined adults), and (2) all other students.

In the period 1962 through 1972, the Legislature made various changes in the funding formula for California's Community Colleges. Basic aid was increased, the foundation program was periodically increased, and the computational tax limitation was raised.

In the 1972-73 session, the Legislature increased the Community College foundation program to $663 and provided an additional $16 per ADA for allocation to equalization aid districts. At this point, the funds provided by the State of California for Community Colleges was about ⅓ of the total financial support required.

In the 1973 session of the Legislature, SB 6 was passed by both Houses and signed by the Governor. SB 6 was a substantial departure from the traditional funding pattern for Community Colleges.

New Finance System Adopted

SB 6 provided an increase in state funds for Community Colleges for fiscal 1973-74 of approximately $65 million, or 31% over 1972-73. Roughly, $13 million of this total will be used toward property tax rollback.

SB 6 increased to approximately 42% (from the current 34%), the proportion of state share of support for annual operation of the Community College.

SB 6 established the 1973-74 foundation program amount at $1,202, with a $0.39 computational tax for "regular" or other than "adult" ADA; and at $556, with a $0.24 computational tax for "defined adults" ADA. It provided an average increase of $107 per ADA for all resident students. This is a change from the present regular foundation program amount of $679, with a $0.25 computational tax.

SB 6 provides for automatic annual adjustments in the foundation program amount in 1974-75, and in subsequent years, to be primarily funded by the state,

and to reflect increases or decreases in Community College operating costs based on an index developed jointly by the Board of Governors and the State Department of Finance.

SB 6 provides a guaranteed revenue base beginning 1973-74, using 1972-73 as the base year.

SB 6 provided for all present permissive tax rates presently being used for operating purposes (not community services) to be combined with the existing $0.35 general purpose tax rate, at the rate currently levied in the base year (1972-1973). SB 6 restricted the use of the "lease tax" for capital outlay purposes and is restrictive of joint powers agreement.

The following permissive taxes were included in the new general purpose rate: adult education, education for mentally retarded, meals for needy students, State Teachers Retirement System (STRS), social security (OASDI), Public Employees Retirement System (PERS), personnel commission, health and welfare districts, inter-district attendance (tuition portion only).

SB 6 provides that voted overrides used for operating purposes shall be included at the tax rate currently levied. The authorized but unused portion of the voted overrides were to be included in the new general purpose rate, but are to be reduced by the amount of permissive taxes levied.

As per SB 6, permissive tax rates remaining outside the new general purpose tax include the following: community services ($0.05), fire and panic safety, children centers, Field act, construction matching, household and personal effects exemption, property use, bond interest and redemption, lease tax.

SB 6 eliminated state basic aid of $125 per ADA for non-resident out-of-state and foreign students. Non-resident tuition will be computed as the full amount of the current cost of instruction.

Being caught up in the inflationary spiral with all other elements of education and industry, California's Community Colleges will find themselves involved in an annual contest to compete for the educational dollar. It is imperative that Community College Trustees make every attempt to stretch the educational dollar as far as possible to preclude the possibility of having to abandon our tuition-free system of higher education for the more traditional model.

Evaluation and Tenure (SB 696)

On September 1, 1972, statutes 1971, Chapter 1654 became effective as State Law governing the evaluation, employment, discipline and dismissal of certificated employees of Community College Districts in California. Popularly referred to as the "Rodda Bill," it established legal as well as administrative provisions for implementation in the four areas mentioned.

The Rodda Bill defines *three categories* of certificated employees that District Governing Boards will employ:

1. *The contract employee* (may be first year or second year); full or part-time employee = *probationary*.

2. Regular employees (may be full or part-time) = *permanent*.
3. *Temporary* = employed on daily or weekly basis or as substitute.

Sound evaluation procedures for the first and second year contract employees enable the Governing Board to make good decisions, based on positive information, in the initial selection and appointment to the faculty. Evaluation during the term of service of regular certificated employees serve as a vehicle to improve the quality of instruction. Emphasis in evaluation is on employee improvement.

Professional evaluation provisions must be adopted by the Board of Trustees of each district. The Governing Board, after consulting with the faculty, must establish specific procedures for evaluation of all contract and regular employees. Those specific procedures shall include:

1. Reasonable but specific performance standards
2. Provisions for evaluation on an individual basis
3. Uniformity for all contract employees
4. Uniformity for all regular employees
5. Provisions for *written* "evaluation statements" to be made for any evaluation conducted.[1]

Contract employees must be evaluated at least once in each academic year while *regular employees* must be evaluated at least once in every two academic years. Written "evaluation statements," together with administrative recommendations form the legal basis for non-reemployment, dismissal or other discipline of certificated employees.

Reemployment provisions apply only to *contract employees* (first and second year).

Temporary employees have no reemployment rights unless the temporary employee was employed 75% of the days during which school was in session in a given school year.

A first year contract employee is entitled to receive a written notice on or before March 15 from his district Governing Board of its decision:

1. To *not* employ her/him for a second year, or
2. To employ her/him for a second year as a contract employee, or
3. To employ her/him as a regular employee (granting of tenure).

The first year contract employee has no right to a hearing on the Board's decision not to reemploy her/him and no right to judicial review.

[1]Thomas Shannon, Schools Attorney, San Diego Community College District, "A Birds Eyeview" of State Law governing the evaluation, employment, discipline and dismissal of certificated employees of Community College Districts. (December 31, 1971).

The second year contract employee is entitled to receive a written notice on or before March 15 from his district Governing Board of its decision:

1. Not to employ her/him as a "regular" (tenured) employee during the third academic year; or
2. To employ her/him as a "regular" employee for all subsequent years.

If the Board's decision is not to reemploy her/him, the *second year contract* employee has a right to a hearing conducted by a hearing officer of the State Office of Administrative Procedure.

(Education Code Section 1344B)

(The decision *not* to rehire must be based on "written evaluation statements" and administrative recommendations.)

Regular employees have a continuing right of employment terminated only by dismissal for cause; resignation, retirement, or death.

All certificated employees must receive notice of intent to rehire or not to rehire by March 15 of each academic year.

The Rodda Bill permits district Governing Boards and any certificated employees to enter into employment contracts which may contain such terms and conditions as the parties agree and as are consistent with the law.

Community College Occupational and Technical Education

The Community College school board has as one of its major responsibilities overseeing a dual curriculum designed to meet the diverse needs of several student populations within its geographic area.

The curriculum of the institution may be classified into lower division academic ("transfer") programs and certificate and associate degree ("terminal") programs. Each is scheduled within the framework of day and evening offerings to students classified as part or full-time enrollees.

Occupational and technical education programs generally fall within the certificate and associate degree pattern. The purpose of these programs is to assist student groups to accomplish individualized occupational and career preparation objectives that they bring with them to the school setting.

Among the student groups are recent high school graduates with a desire to pursue advanced instruction toward an occupational or career objective identified and begun in high school. Yet, another segment of these high school graduates seek a Community College program as a start toward a specific career after taking a general secondary or college preparatory program.

The Community College also serves an adult population of great age span with similar varieties of needs. Some of these students enroll to prepare for a new

career while others seek upgrading and advancement in their present occupation or some form of retraining in a related career field.

In order for a Community College to adequately serve all of these diverg at student goals and objectives, it must recognize also that a portion of those entering occupational and technical programs will need varying degrees of supportive remedial and developmental instruction. These individualized prescriptive kinds of instructional adjuncts most often appear as supplementary courses or learning laboratory offerings to assist in developing written and oral communication skills, elementary or basic computational skills, and personal/social development skills. Ideally, these learning experiences are directly related to the other specialized competencies needed to achieve the individual student's occupational or career objective.

Vocational Education

A concept of a comprehensive educational program proposed by former Commissioner Sidney Marland.

One definition is:

> "Career education represents the total effort of public education and the community to help all individuals become familiar with the values of a work-oriented society, to integrate such values into their personal value structure, and to implement some set of work values into their lives in such a way that work becomes possible, meaningful, and satisfying to each individual."
>
> —Kenneth B. Hoyt
> Professor of Education
> University of Maryland

Further terminology that is synonomous with "career education" is defined as follows:

a. Occupational Education

Any training preparing students for employment or for advancement in an occupation. Usually synonymous with "vocational education."

b. Technical Education

Training for entry or advancement in an occupation in which the principles and usage of mathematics and science are important elements. Sometimes used as an alternate term for "vocational education."

c. Vocational Education

Training for entry employment or advancement in an occupation, which training can be achieved without the baccalaureate degree. Hence, in public education, it is usually limited to high schools or Community Colleges.

Legal Responsibility for Vocational Education

The Education Code clearly indicates that the Community College has the responsibility to provide vocational education:

> 7504. Legislative policy; educational opportunity — The Legislature hereby recognizes that it is the policy of the people of the State of California to provide an educational opportunity to every individual to the end that every student leaving school should be prepared to enter the world of work; and that every student who graduates from any state-supported educational institution should have sufficient marketable skills for legitimate remunerative employment; and that every qualified and eligible adult citizen should be afforded an educational opportunity to become suitably employed in some remunerative field of employment. (Added by Stats. 1971, c. 713, pg. 1384)

Vocational Education in the College Program

The commonly stated goals or purposes of the comprehensive Community College are to provide:

- Lower division programs leading to transfer to a four-year college.
- Vocational education courses and programs leading to employment or advancement in an occupation.
- General education courses or programs as needed by the students and the community.
- Community service programs for community enrichment.

Vocational education is a significant part of the comprehensive college program and should be identified as such in any statement of college philosophy

Vocational Education in the College Program

Vocational Education takes many forms in the Community College:

a. Pre-employment Programs

Programs preparing for initial entry into a specific occupation. Most usually found in the day program. May be organized to lead to the A.A. degree or may be a "certificate" program and completed in one or more terms.

b. Extension Programs

Programs or courses designed to enhance or improve the competence of workers in the occupation in which they are currently employed. Most frequently scheduled in the evening program.

c. Apprentice Training

Courses or programs designed exclusively for apprentices in the skilled

trades and indentured with the Division of Apprenticeship Standards (a state agency) with the state Shelley-Maloney Act.

d. Retraining Courses

Courses designed to provide new occupational skills to those persons displaced from earlier employment. Most often operated in day hours and may be supported by federal "manpower" funds. May or may not be college credit courses.

e. Adult Education Courses

Non-credit courses designed to meet the needs of residents for whom college credit is unimportant. Most commonly in subject areas not typically considered of "collegiate" level or intensity.

Quality of Vocational Education

Board members are concerned with the quality standards of the vocational program. Some guidelines are available:

a. California State Plan for Vocational Education

The legal agreement between the state and federal government regarding acceptance and use of federal vocational funds. Standards enunciated must be met if a program is to qualify for federal support.

b. COPES Program

A voluntary program of peer evaluation in vocational education. Useful in validating the performance of the vocational program of the college. "Criteria" as well as a COPES Guide are available from the Chancellor's office.

Several sources of federal funding are available for qualifying programs:

a. V.E.A. (Vocational Education Amendments)

This fund has several parts. Some are available almost automatically; some are by application and are awarded on the basis of merit.

b. Nurse Training Act

May provide support for Registered Nurse Training programs.

c. Allied Health Professions

May provide funds for a specified list of occupations.

d. Other sources may be available depending on the determinations of Washington.

Student Services

Community Colleges are committed to the concept that education exists for the purpose of assisting students in planning and achieving their goals and objec-

tives. Student personnel services are necessary to assist students to meet their objectives. A 1962 AAJC Monograph, authored by J. W. McDaniels, identified essential student personnel practices,[1] and a listing of these practices illustrates the importance of a student personnel program:

- Informing On-coming Students
- Helping Students Make Appropriate Educational and Vocational Plans
- Helping Students Choose Best Levels in Courses
- Registering Students
- Orienting New Students
- Helping Students to Perform at Optimal Levels in Courses
- Helping Students Resolve Individual Problems of Housing, Finance, and Health
- Helping Students with Personal Problems
- Helping Students Select and Transfer to Next Direction
- Testing and Test Interpretation
- Counseling
- Record Keeping
- Conducting Institutional Research on Student Characteristics
- Evaluating Personnel Practices and Instruments
- Encouraging Student Activity

Naturally, how California Community Colleges implement these practices varies greatly among the colleges. This diversity reflects the differences among institutions in philosophies, communities, budgets, facilities, staffs, and student bodies. The ability of each college to determine the nature and extent of student services on a local level is important, then, if local college and community resources are to be used effectively in meeting student requirements.

Perhaps this paper can be most helpful by describing how services are implemented on our campuses and by citing some examples of current practices.

Prospective Student Services

Student services often reach the student even before he or she applies for admission. Information may be disseminated through campus tours, newsletters, off campus information centers, and guidance courses offered on high school campuses. Some institutions, like Contra Costa, Foothill, and DeAnza Colleges, have mobile units staffed by professional counselors who take pre-admission

[1] J. W. McDaniels, *Essential Student Personnel Practices for Junior Colleges*, Student Personnel Commission of the AAJC, Washington, D.C., 1962, p. 17.

counseling to prospective students in schools, shopping centers, and neighborhoods. One can anticipate even more attention to recruitment programs since higher education has shifted from a seller's to a buyer's market.

Registration and Records

It would seem that admissions and records should be a rather simple process in our "open door" colleges. However, interdistrict agreements, a complex residency law, and detailed information required for state reports necessitate extensive data gathering and processing. The ways that colleges go about the process of registration probably number as many as the colleges themselves. Consortia have even been formed to develop the ideal method of registration, but each college normally must develop its own system to fit its budget, data processing equipment, etc. Systems thus vary from highly computerized systems to mail registration, to the traditional mass registration in a gym or auditorium.

Maintaining accurate student records is an important function, and the physical problems involved in storage, access, and retrieval are complicated by the variety of course offerings and many part-time students. Microfilm, microfishe, and magnetic tape systems have been adopted by campuses, to meet these problems.

The complexity of admissions and records operations can readily be understood when one considers an institution such as Long Beach City College which registered 29,000 students in 55 different locations this Fall, and the student records system at that institution must not only support the education process but must also serve as a basis for certifying enrollment for such matters as veterans and social security benefits and other financial assistance.

Counseling

A coordinated counseling program is necessary to provide educational, vocational, and personal guidance. Again, how colleges meet these needs varies widely. Dr. Jerry Girdner, Dean of Student Personnel at West Valley College,

conducted an annual counselor/counselee ratio for several years, and his 1971-72 figures revealed that the ratio ranged from one counselor for every 327 students at one college to one counselor for every 1019 students at another college. (Girdner's ratios did not take into account evening students.) Of course, a ratio study cannot take into account the variables involved in the organization of counseling. For example, one school may rely heavily on faculty advisors or peer counselors for assistance in educational advising while another school may assign all advising to a large counseling staff. And some schools utilize group counseling extensively while others rely completely on individual counseling.

Drop-in centers are being established at some institutions. For example, San Jose City College's drop-in center is a place where a student can find a college staff member or a trained peer who can help the student work through problems and frustrations that are blocking his or her academic progress. Groups are also formed in the center to explore marital problems, divorce, human sexuality, women's problems, racial concerns, weight control, and others as needed.

Career centers are another recent development. Moorpark College for instance, has a career center located in the Campus Center, offering a comprehensive and up-to-date collection of occupational materials, a variety of career-oriented activities, and a means of making contact with faculty and community resource persons. In just a little over a year, 7327 students used the center, and 1077 of these students talked with a career counselor. Career development classes are also offered in the Center with 20 courses available to day and evening students.

Testing is available to community students for assistance in exploring aptitudes, interest, and personality characteristics as students choose major fields of study and careers. Monterey Peninsula College counselors have developed a self-administering test which allows a student to assess his/her own aptitudes, interests, temperaments, physical capacities, desired working conditions, and the amount of time the student is willing to spend in career preparation. A computer print-out of the test results provides the student with a rank ordering of compatible career fields which are coded for easy reference to the *Dictionary of Occupational Titles* and *Job Outlook Handbook*. After taking the test, the student may work under the guidance of a counselor in researching appropriate careers. Credit is obtained for the project which helps to identify an appropriate career goal and the means of achieving it.

Thus, counseling takes many forms and there is probably no formula for the best way to provide adequate guidance on all campuses.

Learning Assistance

Helping students to perform at optimal levels in courses can be achieved through such efforts as providing assistance with study habits, skills, and techni-

ques, time utilization, developing positive attitudes toward college, and identifying interests and goals. Attention must also be given to sight, hearing, academic skills in reading and writing, and general readiness in subject matter background. Learning centers, like the one at San Jose City College, may be an appropriate place to locate such assistance. That center also provides self-instructional materials in note taking, listening, memory development, effective use of textbooks, vocabulary building, and test taking.

One of the most popular approaches in providing learning assistance is through tutoring provided by students. Many colleges now have highly developed student tutoring programs which even reach into the secondary and elementary schools.

DeAnza College recently established a program for educationally handicapped students organized around learning disability groups. Each group is limited to a maximum of eight students with a full-time special education instructor for every 32 students. A significant proportion of community college students can benefit from such an approach, and special state funding is available.

Co-Curricular Activities

The Education Code provides for the organization of a student body association to conduct activities on behalf of the students, and most, if not all, community-college student bodies have formed associations and offer many activities.

Colleges generally provide professional leadership for student guidance in assuring that activities have positive educational value. However, financing of the activities is difficult at many institutions because of the heavy reliance on voluntary student body card sales. Some schools are able to sell cards to practically all students, while others achieve a very low sales. So the kinds of activities that can be financed differ from campus to campus.

Student interests change from semester to semester, but speakers are generally popular, and balanced speaker programs are offered by most campuses. Film series also rate high with students currently, as do volunteer programs. Ecology groups sponsoring recycling projects and environment protection movements are active on campuses, and special interest groups such as sailing and skiing clubs continue to attract students. Service and social groups see some participation, but along with homecomings and pep rallies, they have not maintained the interest they once had.

Intercollegiate athletics may not attract as many spectators as they once did but participation is strong and has even been broadened with the expansion of some women's sports and the elimination of the male limitation in other sports.

Campuses may be allowed to strengthen their activity program if student proposed legislation, designed to allow local boards to require a student to purchase a student body card, is approved.

Health Services

Probably the one service that sees greater differences among the campuses is the health services offered. The fact that it is legal to charge a $7.50/year fee per student to provide health services has not resulted in uniformity in the type of services offered. Some colleges rely completely on off campus services with the extent of their health program being a student accident insurance policy. One of the most highly developed on-campus programs is at San Francisco City College which charges no health fee but calls upon the Public Health Department for physicians, clinics, and laboratory work. In addition, the University of California Medical School and the University of Pacific Dental School students do required field work at City College, giving time to crises and referrals. Also, a demonstration mental health clinic, supported by district, private, and federal monies, offers psychological counseling and group psychotherapy. The Public Health Nursing Program at City College saw 5100 students last year on such matters as accidents, injuries, flu, rashes, anxiety reaction, pregnancy, contraceptive concerns, immunizations, eye glasses, and tooth aches. The Women's Clinic offers advice on cancer, venereal disease, rubella screening, and treatment of vaginitis.

Most colleges do have a nurse on duty to offer health counseling, first aid, vision and hearing screening, and referral services.

Financial Aid

Taxpayers may have the impression that our tuition free colleges provide completely free education to our students. However, students must still bear the cost of some fees, books, supplies, equipment, transportation, and, in many instances, room and board. Many of our students must help support families while they attend. Thus, financial assistance is a major consideration in a student's ability to attend a community college.

The task of providing that assistance has become complex. The financial aid advisor must analyze and verify student need in accordance with assorted

guidelines. Then the advisor must make the best use of available resources by granting aid in combinations of loans, grants, scholarships, and/or work-study jobs to best meet individual student needs. Of course financial counseling is necessary to help assure that the student makes the best use of his or her resources, and follow-up is required to check on student progress and status.

Job Placement

Professional job placement workers may help students stay in college by finding part-time and full-time jobs for them. They also may perform such important tasks as bringing employers to the campus to recruit students into long-term careers, establishing a job placement file for students, providing assistance in developing resumes, offering workshops on job application and interview procedures, publicizing job opportunities, encouraging employers to employ veterans, and promoting good work habits and attitudes through follow-up and evaluation of student workers.

Work exprience and cooperative education programs may work jointly with job placement in developing a new emphasis on the relation of education to work.

Special Services

Probably the most dramatic change in student personnel services since McDaniel published his 1962 monograph on essential services has been in the development or intensification of special practices to better serve economically disadvantaged students, students of ethnic minority backgrounds, veterans, older students, handicapped students, and women. This change has brought about increased activity in special recruitment, tutoring, peer counseling, financial aids, job placement, and guidance courses.

People of ethnic minorities and economically deprived backgrounds have been unable to attend college in representative numbers. Fortunately, California legislation (SB 164, Alquist) has supported programs on our campuses which are designed to attract and assist disadvantaged students.

Special funding is also available for such needed assistance as special registration, adaptive physical education, transportation, and educational aids to make it possible for physically handicapped students to attend college.

Also, federal legislation has provided financial incentive to colleges for educating veterans, making it possible to recruit and provide certification advising, tutoring, and college refresher courses. The number of veterans now attending colleges, while not up to post World War II proportions, is surprising on those campuses where special efforts are being made for them. For example, approximately 30% of Monterey Peninsula College's entire student enrollments are students receiving GI Bill assistance.

Women often have unique problems in continuing their education, and some mention has already been made of the way in which colleges are responding to their needs in such matters as health care and counseling. A very practical problem for many women is how to care for their children while they attend classes, so some colleges have established child care centers on campus.

Foreign students are another unique group of students who need special help with housing, cultural adjustment, and language problems. Foreign student advisors and citizens' committees help fill this need.

High School and College Articulation

High school articulation is normally not a difficult matter in community colleges because of the proximity of the local high schools and the close working relationships that usually exist. However, close coordination is needed to make the most out of our educational resources through advanced placement and regional occupational programs.

College articulation is another matter. Efforts have been made on a statewide basis to improve articulation, and it is now possible for the community college to certify which courses are of baccalaureate level and to certify the meeting of general education requirements of the California State Colleges and Universities. Even so, institutional and departmental requirements differ and complicate course planning. Constant liaison is required to be able to provide accurate advice to students.

Housing and Food Services

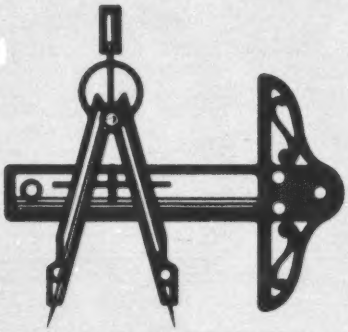
While student housing is not usually associated with community colleges, it is a critical item for some students. In large districts, dormitories are required. Both Shasta College and Sierra College serve such large territories that on-campus housing is required.

Our population is so mobile that many of our students need assistance in locating housing in the community and many schools maintain referral lists.

Food service of some kind is required on most campuses. Sometimes the food service is contracted to a caterer, sometimes it is handled by the college's own staff, or it may even be a part of a food service and management curriculum.

Bookstores

Campus bookstores are owned by Associated Students in some cases and by the District in others. Supervision, nevertheless, is generally a district matter. Efficient management is extremely important to assure that students are able to get necessary textbooks, supplies, and equipment. Many stores have evolved to



much more than textbook dispensers and also serve as educational and recreational supply sources. Profits are usually put back into activities that benefit students.

Research

Student personnel workers are frequently responsible for providing data on student characteristics and enrollment trends for a comparative data base. Currently, 32 community colleges are cooperating in a legislative mandated study of the persistence and performance of 32,000 students. This study is making available a great deal more information about our students and may make it possible to reassess our educational effectiveness.

Systematic approaches to research on individual campuses is rare, and this is probably due to lack of staff, support, and emphasis. With adequate research we might acquire valuable information to help in making decisions about student services. For example, a study conducted by Gladys Dallas at Napa College illustrated that special counseling paid off in lower attrition rates, higher student grade point average, and more completed units.

Evaluation

All certificated student personnel workers are subject to the same evaluation law as teachers. Procedures have been established at individual campuses for self, peer, supervisor, and student evaluation of work performed by student personnel staff. In addition, criteria for evaluating student personnel services are included in the Western Association of Schools and Colleges accreditation kits. Currently, the California Community College Governing Board is studying student personnel services and there appears to be preliminary agreement that more attention may be needed in vocational counseling and guidance and to the extension of fuller student services to evening and external campus programs.

Hopefully, additional financial support will be: (1) broad enough to permit individual institutions to determine needs and priorities for services and programs; (2) adequate to allow each institution to provide essential services; (3)

free from applications and reporting that require time and money to prepare; (4) designated for improving or extending existing services and/or developing new services rather than replacing current funding.

Whatever the source of financial support, it is clear that our diverse student bodies require comprehensive student services to help assure that individual students identify and achieve their goals and objectives.

Community Services

Community Services is now recognized as a major function of the Community College and has helped the colleges become a catalyst in community development and self-improvement.

The Community Services contribute to the cultural, social and intellectual life of the college district community by providing programs either in cooperation with other agencies or sole sponsorship in a flexible program of educational, cultural and recreational services, above and beyond regularly scheduled day and evening classes and for all members of the community.

A partial listing of the objectives of the program includes:

1. To make the college a center of community life by encouraging the use of college facilities by community groups when such use does not interfere with the college's instructional program.
2. To provide for community groups and the community at large, educational services which utilize the special skills and knowledge of the college staff and which are designed to assist the community in solving problems as they arise.
3. Recreational programs that contribute to the health and physical well-being of individuals in the community and to the oral life of the college district community.
4. To interpret the college and its program to the community and to enlist the active interests, support and participation of citizens in the college program.

Community Services programs appear in many forms including:

1. Short-term, non-credit courses;
2. Forum and community meetings;
3. Concerts and lectures;
4. Facility use (rooms, equipment, supplies);
5. Recreational activities; and
6. Speakers bureau.

The Board of Governors of the California Community Colleges, on February 18, 1971, adopted a position paper stating that a major function of the Community Colleges is adult and continuing education.

A working definition of continuing education would include:

1. Graded classes organized primarily for adult students usually offered during evening hours and which meet all of the standards specified in the college catalogue and equally applied to both day and night students.
2. Only students meeting prerequisites are enrolled.
3. Students are awarded marks or grades on the basis of methods of evaluation set forth by the college and subject to standards of retention.
4. Repeated enrollments are not accepted unless there are unusual circumstances.

A working definition of classes for adults given at any time of the day or evening which meet the following partial list of criteria:

1. Designed primarily for adults
2. Do not necessarily require prerequisites before a student can enroll.
3. Are not necessarily part of an organized sequence of classes.
4. Need not be part of a graded program.
5. Offer elementary and secondary school diplomas and subjects if requested to do so by a secondary district.

The Board of Trustees of Community College Districts are authorized without approval of the Board of Governors to establish and maintain community service classes as follows:

> Lecture and forum series; avocational and recreational type classes; classes designed to provide instruction for physical, mental, moral, economic or civic development.

Community colleges consider appropriate, the offering of any short-term, non-credit courses if a need has been identified which is not being met otherwise, and which the college can feasibly arrange to meet. Every effort is taken to coordinate the course offerings with other educational agencies in the community in order to avoid duplication. These courses are offered on the college campus, at satellite campuses, or at other locations in the community.

Examples for offering courses would include:

1. Improving skills;
2. Providing for retraining of displaced persons;
3. Identifying with specialized skills;
4. Assisting in job training and upgrading;
5. Assisting the disadvantaged;
6. Studying social issues (phases of rebellion, turbulent teens, etc.)
7. Studying community problems (pollution, urban beautification, etc.);

8. Exploring women's interests (personality, today's women and grooming, etc.);
9. Providing information on specific interests (estate planning, investment for the small investor); and
10. Improving human relations (courses for policemen, firemen, etc.).

The Community Services courses differ, for the most part, from adult education courses in that they are:

1. Non-credit;
2. Short-term duration;
3. Open, at times, to all age groups;
4. Non-traditional;
5. Oriented toward problem solving;
6. Aimed at immediate response to nontemporary issues and problems;
7. Offered in the summer if needed;
8. In most cases, designed for college level and above; and
9. Flexible in time and depth.

Restricted Community Services tax funds are used for those capital outlay expenditures which are essential to the operation of the Community Services program; or are shared by the regular college program and limited to that proportion of the usage which falls under Community Services.

Restricted Community Services tax funds which are accumulated from year to year for capital outlay purposes can be spent only for Community Services.

The Community College faces educational challenges no longer definable in the context of traditional academic effort. If maximum progress is to be made, if resources are to be used efficiently, if service is to be made available to all who need it, and if institutions within the community are to work effectively with institutions at state, regional and national levels, some scheme for systematizing these multiple continuing education relations must be clearly defined.

Such a scheme should serve to regularize communication, build awareness of shared purposes, promote community-wide planning, facilitate cooperation, avoid needless overlapping and overlooking, and make the most effective use of limited professional leadership.

It should respect the autonomy of participating agencies and institutions; recognize differences in their purposes, commitments, and resources; and allow for differing levels of involvement and participation in the system.

It should facilitate timely decision and effective action; and it should serve to relate the entire continuing education enterprise to the needs of mature persons in a changing and challenging world.

12

Legal Calendar

Date	Person or Body Affected	Requirement	Authority
		JULY	
July 1	All Schools	School year begins	5101
On or before July 1	Governing Board	Make annual report to the County Superintendent of Schools	1031(c)
July 1	Governing Board	Shall select one member to represent board in the election of the County Committee on School District Organization	932.1
July 1	Governing Board	Permanent certificated employee's failure to notify district of intention to work is cause for suspension	13260
On or before July 1	Governing Board	File a tentative Budget with County Superintendent of Schools	20607(a)
On or before July 15	County Superintendent of Schools	Makes Technical changes to district and/or recommendations to Governing Board.	20607(b)
On or before July 15	Governing board, high school district	Certify tuition charges to County Superintendent having jurisdiction of elementary school district for which high school district provides election	
July 4	All schools	Fourth of July; all public schools shall close	5201(a)
On or before July 20	Governing Board	Make changes in budget and return it to County Superintendent	20607(c)
Last week in July	County Superintendent	Publish summary of proposed budget and hearing date except in districts with only one teacher or levying no district tax	

Date	Person or Body Affected	Requirement	Authority
		AUGUST	
First week of August	Governing Board	Hold budget hearing except in districts levying no district tax or employing only one teacher or over 200,000 ADA	20504
On or before August 5, and Sept. 5	Governing Board	Districts not paying salaries on a 12-month basis and withholding from each payment 16⅔% must pay employees one-half of total salary withheld	13519
On or before August 8 (August 10 if ADA in excess of 10,000)	Governing Board	Adopt a final budget and file budget with County Superintendent of Schools, County Auditor, County Board of Supervisors, and the Superintendent of Public Instruction	20607(d)
On or before August 15	County Superintendent	Approve district budget and file with the County Auditor, County Board of Supervisors and the Superintendent of Public Instruction	20607(e)
On or before August 15	Governing Boards, all schools	Prepare for public inspection the financial statement of district for preceding fiscal year, and estimated expenses for current year	20501
		SEPTEMBER	
On or before Sept. 5	Governing Board	Districts not paying salaries on a 12-month basis and withholding from each payment 16⅔%, must pay employees balance of salary withheld	13519
Sept. 9	All schools	Admission Day; all public schools shall close except as in 5210	5201a
First Mon. in Sept.	All schools	Labor Day. All public schools shall close except as in 5209-10	
Not later than Sept. 15	Governing Board	Request exemption from payment of state apportionment money (65% of Foundation Program) in salaries to certificated personnel	17503
		OCTOBER	
Between October 1 and December 1	Governing Board, County Superintendents	Annual meeting of school board members in counties of six or more elementary districts to elect County Committee on School District Organization	932.1

Date	Person or Body Affected	Requirement	Authority
		NOVEMBER	
On or before 3rd school month	Governing Board	A temporary teacher not dismissed in 3 months becomes a probationary teacher	13446
November 11	All schools	Veterans' Day; all public schools shall close except as in 5209-10	5201a
		DECEMBER	
December 25	All schools	Christmas Day; all public schools shall close	5201a
No later than December 31	Governing Board	Notify district superintendent of intention not to renew a contract for his services, if the contract terminates at the end of the fiscal year and the supt. is to be dismissed	938
After December 31	Governing Board	Certificated person not employed in school district may be elected for next school year	13258
		JANUARY	
January 1	All schools	New Year's Day; all public schools shall close except as in 5209	5201a
		FEBRUARY	
On or before February 1	County Board	Establish rules and regulations for elementary districts under 2,500 ADA to purchase standard school supplies and equipment	16501
February 12, or day school is next in session proceeding	All schools	Shall hold commemorative exercises for Lincoln's birthday	5203
February 12	All schools	Lincoln's Birthday; all public schools shall close except as in 5209-10	5201a
February 15	All schools	Special exercises for Susan B. Anthony Day	5206
Third Monday in February	All schools	Washington's Birthday; all public schools shall close except as in 5209-10	5201a
February 22	All schools	Shall hold commemorative exercises for Washington's birthday	5203

Date	Person or Body Affected	Requirement	Authority
		MARCH	
March 7	Public Schools	Observe as Conservation, Bird, and Arbor Day	5205
30 days prior to 3rd Tuesday in April	Candidate for governing board	File declaration of candidacy with County clerk	1129
On or after March 15	Governing board	First day on which persons requiring certification qualifications may be reelected	13258
Not later than March 15	District Superintendent	Recommend in writing to probationary employee and to governing board that employee be given notice of intent not to re-hire and states reasons thereof	13443a
March 5	All schools	Black American Day. Observe this day with suitable exercises	5206.1
March 31	Governing board	Last day to forward applications to State Department of Education for financial assistance for areas affected by Federal activities	Pub. Law 874
First Tuesday after first Monday in March, odd-numbered years	Governing Board	Governing Board Election Biennial election of members of governing boards	1111
		APRIL	
April 1	Governing Board	Terms of office begins for newly elected members	1111
On or before April 1	Governing Board	Provide for audit of district funds	17206
After April 1	County Superintendent	Provide for audit of district funds if proper arrangements have not been made by the governing board	17206
Between April 1 and April 15	Governing Board	Meet (annually) and elect a clerk and if a 5-member board, a president	964
		MAY	
On or before May 1	Governing Board	Request an allowance for replaced busses from Superintendent of Public Instruction	T5 1300
Not Later Than May 1	Governing Boards, County Superintendent	Shall provide for audit of all funds under their jurisdiction	17206
On or before May 15	Governing Board	Notice of dismissal of probationary employees	13443(e)

Date	Person or Body Affected	Requirement	Authority
Before May 15	All Governing Boards	Give notice to certificated employees of termination of service because of reduction in enrollment	13447
Last Monday in May	All Schools	Memorial Day; all public schools shall close except as in 5209-10	5201(a)
		JUNE	
Close of school year	County Superintendent	May make budget transfers with consent of the governing board	20952
During June	Governing Board	Request Library Funds from County Superintendent	7252
June 30	All schools	School year ends	5101
		OTHER	
Annually	Governing Board	Prepare and keep on file courses of study for public inspection	8001
Annually	Governing Board	Visit each school in the district at least once in each term or delegate the responsibility	1053
Not more often than once a year	Governing Board	May publish in the press information regarding financial condition of district	20506
Monthly	Schools	Sound the fire alarm	12002
Monthly by 10th day of month	Governing Board	Teachers, less than full time and in evening high schools may be paid on or before the 10th of succeeding month	13521
Monthly or more often if necessary	Governing Board	Bills are presented to the district for reimbursement from revolving cash fund	21304
Daily	Governing Board	Deposit all money received from all sources unless County Superintendent authorizes otherwise	17152
Any time	All schools	Holidays appointed by the Governor which provide for the public school to be closed	5201b
Any time	All schools	Public schools shall close on every day appointed by the President as a holiday, unless it is a special or limited holiday	5201c
Any time	All schools	Public schools shall continue in session on all legal holidays other than those designated above and shall hold proper exercises commemorating the day	5201d
Any time	All schools	When any holiday falls on Sunday, the public schools shall close on the Monday following	5201e

Date	Person or Body Affected	Requirement	Authority
Any time	Governing Board	May delcare a holiday in the public schools when a good reason exists	5202
Any time	All schools	When any holiday falls on Saturday, the public schools shall close on the preceding Friday	5201f
Any time	Governing Board	May print and distribute in pamphlet form an annual financial statement and may include in pamphlet a general report of conditions of the schools	20506
Any time	Governing Board and administrative officer	Appear before a citizens' group when requested to explain election for bonds or increased tax rate	1073
Any time during the school year	Governing Board	Transfer from the undistributed reserve to any expenditure classification or between expenditure classifications by written resolution filed with the County Superintendent and co-Auditor	20951
Within 30 days of vacancy or filing of deferred resignation (check code for exceptions)	Governing Board	Board either makes a provisional appointment or calls for a special election to fill vacancy	1162
Within 10 days of provisional appointment	Governing Board	Post notices of both the actual vacancy or resignation and the provisional appointment	1162.5
Period between four months and 74 days prior to regularly scheduled election	Governing Board	Board is prohibited from calling a special election or appointing someone to fill a vacancy on the board	1163
Not less than 54 days before the election	Qualified voter	Closing date for registration of voters	1361
10 days prior to meeting	Governing Board	Post notice regarding a meeting of electors to determine a change in location of schoolhouse, or for consultation in regard to any litigation, or in regard to general affairs of the district	1022
15 days prior to the meeting	Governing Board	Notice of hearing on proposed sale or lease of real property	16058
45 days after notice of election	Governing Board	Nontenure certificated personnel must acknowledge acceptance of election or deemed to have declined employment	13259

Glossary

Following are definitions of some of the terms with which school board members should be familiar. Terms pertaining to finance have been included in a mini-glossary inserted directly into Chapter VI entitled, "Understanding School Finance."

Affirmative Action Employment Program	Planned activities designed to seek, hire and promote women and persons of minority racial and ethnic backgrounds as a conscious, deliberate step taken by a hiring authority to assure equal employment opportunity for all staff, both certificated and classified.
Anniversary Date	The date of completion of a required period of service. Sometimes called increment date.
Appointing Authority	The board of trustees, governing board, or Personnel Commission.
Assignment	Placement of an appointee in a position. Also, the position in which she/he is placed.
Certificated Employee Council	The group of employee organization representatives with whom the public school employer shall meet and confer with regard to matters within the scope of representation, in the event there is more than one employee organization representing certificated employees.
Classification Plan	The official document adopted by the governing board or commission which allocates all positions to classes. The classification plan designates the titles and specifications for position class.
Eligibility List	A list of the names of persons who have qualified in an examination for the selection of classified employees for a specific class.
Equal Job Opportunity	The elimination of discrimination in employment.
Fact Finding	The process of selecting an agreed-upon, non-involved agency, or individual, to investigate, assemble, and report the facts in a labor-management dispute, sometimes with the authority to make recommendations for settlement.

Fiscal Year	July 1 to June 30.
Fringe Benefits	Term used to encompass items such as vacations, holidays, insurance, medical benefits, pensions, and other similar benefits that are given to an employee under his employment in addition to direct wages.
Grievance	Any dispute concerning the interpretation of policies, and/or rules and regulations governing personnel practices or working conditions.
Incompetent	Failure to perform adequately the minimum standards of duties required for a given position.
Increment	A salary increase provided for in certain pay plans.
Injunction	A court order restraining individuals or groups from committing acts which the court determines will do irreparable harm. There are two types of injunctions: temporary restraining orders, issued for a limited time and prior to a complete hearing, and permanent injunctions, issued after a full hearing, in force until such time as the conditions which gave rise to their issuance have been changed.
Leave of Absence	An approved absence from duty with or without pay for a prescribed period of time.
Mediation	Assistance by an impartial third party to reconcile an impasse between the public employer and the exclusive representation regarding wages, hours, and other terms and conditions of employment through interpretation, suggestion, and advice to resolve the impasse.
Meet and Confer	The mutual obligation to exchange freely information, opinions and proposals; and to make and consider recommendations under orderly procedures in a conscientious effort to reach agreement by written resolution, regulation or policy of the governing board effectuating such recommendations.
Persistent Disagreement	A disagreement under the Winton Act between the parties meeting and conferring that has not been resolved to the mutual satisfaction of the

	parties through such meeting and conferring with a reasonable period of time after the initial presentation of proposals, which shall not be less than 30 days, except by mutual consent.
Personnel Commission	Three members appointed in accordance with Education Code provisions and responsible for maintenance of the merit system for classified employees.
Petition	A written statement circulated by a single person or a group to obtain signatures of persons requesting the board to understand their particular position on an issue. The board may use its own discretion regarding the disposition of petitions.
Prevailing Rate	Wage rates that are paid to most workers engaged in the same or similar occupations within a geographic or labor market area.
Public Sector	Employment in a governmental organization including state, county, cities, school districts, fire and other special districts where wages are paid from tax income.
Public Notice	Placed announcements of examinations, meetings, hearings and other actions of the governing board or Personnel Commission on official bulletin boards.
Quorum	A quorum consists of a majority of the membership of the board and is necessary for a legally constituted meeting.
Recall	The removal of any elected or appointed school board member by election under provisions outlined in legal statutes.
Required Records	A set of minutes of the decisions of the board which are recorded and may be inspected by citizens who desire to do so. Because of the importance of public records, board members should carefully examine the minutes before final adoption. Records must be kept relating to pupil accounting and the instructional program as required by the State Board of Education.

Salary Range	A specific number of steps of pay within a classification range.
Salary Step	One of the salary levels within the range or schedule of rates for a classification.
Sex Discrimination	Those attitudes and actions which relegate one sex to a secondary and inferior status in the society, particularly assigning roles, characteristics, and opportunities to one sex which are less desirable and less positive than those assigned to the other sex.
Sex-typing	Any rigid designation of interests and behaviors to only one sex. This occurs in classroom organization, teacher responses to, and expectations for, students in differentiated counseling, career orientation and extracurricular activities.
Step Advancement	Movement to a higher step on the salary schedule.
Strike	A work stoppage in a plant or industry for the purpose of gaining concessions from the employer. The term strike may also be interpreted as any concerted slowdown or other concerted interruption of operations by employees and is sometimes extended to mean any form of withholding of full, faithful and proper performance of duties.
Y-Rated Employee	A person whose salary rate is frozen above the normal salary for a step within a range.

Appendix A

In order for school trustees to have some knowledge of a philosophy of education one has been included in this Boardsmanship. It is a philosophy actually adopted by one of the school districts in California and delineates the expectations and goals that the district hopes to reach in educating its students.

Philosophy of Education

The Board of Trustees of the _____ believes that the schools in our district belong to all the people, are supported by the people and are designed to carry out the wishes of the people of the district for the education of our children.

We believe that there is inherent in the American belief a concept that the individual is important and that the public school system should give each individual opportunity to develop to the maximum of his potential.

We believe that the true function of the elementary school is to nurture the intellectual growth of the children — all other objectives are supplementary to this one great purpose. We believe that a school program attains excellence when it provides genuine opportunity for all and when it challenges every pupil to achieve his best.

Public education must help individuals develop their abilities in acquiring and using information and skills. In achieving this objective it is important that children:

1. Be provided with learning tasks which are challenging yet within their capabilities, leading to excellence of academic pe.formance which will develop a continuing pursuit of knowledge; insofar as their abilities permit, to give each child a sound mastery of the tools of learning such as reading, writing, arithmetic, and the use of spoken language.
2. Be given opportunities to observe, investigate, and demonstrate an understanding of the world in which they live.
3. Learn to recognize problems, and how to select, evaluate and use pertinent information in solving them.
4. Gain necessary information and skills through experiences that are meaningful to them, followed by practice and application.
5. Be provided leaning experiences which include the use of a variety of sound educational materials and methods.
6. Be aware of their progress toward fundamental educational goals.
7. Learn to care for their own personal health and safety.

Public education must help individuals prepare for the privileges and respon-

sibilities of citizenship in our democracy. In achieving this objective it is important that children:

1. Learn and develop patriotism and loyalty to our country and the American way of life.
2. Learn that all individuals have worth and dignity.
3. Learn to work with many kinds of people.
4. Learn to accept the responsibility for their individual actions in a group, or as part of a group.
5. Learn respect for constituted authority.
6. Learn the moral and spiritual values upon which present day civilization is founded.
7. Develop qualities of leadership and learn to recognize and support good leadership.
8. Develop qualities of competence and creativity.
9. Be offered educational experiences which fit their abilities and needs, and receive constructive contributions to their education from many persons, groups and organizations.

Public education must help individuals gain an understanding of people, to retain their own individuality, yet learn to work and cooperate with the group. In achieving this objective it is important that children:

1. Gain the knowledge, skills and appreciations needed for successful living with others.
2. Acquire a sensitivity toward those who are in circumstances different from their own.
3. Gain an understanding of the interdependence of all people and learn to appreciate the contributions of all.
4. Develop an understanding and appreciation of the importance of family life in the United States of America.
5. Cultivate worthwhile friendships.
6. Be encouraged to show initiative and develop confidence in themselves as individuals.
7. Hold service to others as a worthy ideal.

Public education must help individuals build the foundations upon which efficiency in earning a livelihood will ultimately depend. In achieving this objective it is important that children:

1. Develop an appreciation for those who work and what they produce.
2. Learn to place value on the job that is well done.

3. Learn the value of human and material resources and the necessity for conserving them.
4. Develop skills and abilities which help them become contributors to the total welfare of society.
5. Develop interests and understandings about many occupations.
6. Be given experiences which help them develop a degree of economic understanding appropriate to their levels of maturity.

Appendix B

CSBA's Publications

The following is a list of CSBA publications that give specific information on various areas of concern.

1. Analysis of the Education Code for Community College Districts
2. Board/Superintendent Responsibilities
3. Brown Act Requirements for School Board Members
4. County Boards Manual
5. Education Code Analysis and Index
6. Educational Goals and Objectives
7. Educational Planning and Evaluation Guide for California School Districts
8. Employer/Certificated Employee Relations
9. Evolving Educational Goals for California Schools: Four Case Studies
10. The New Textbook System
11. School Strikes — Prevention and Settlement
12. School Strikes — What to Do About Them
13. Selecting a New Superintendent
14. Statewide Testing
15. Superintendent/Board Relationship
16. Winton Act Process of Meeting and Conferring
17. Special issues of the *California School Boards* Journal:
    - February, 1973 - Year-Round Schools
    - February, 1974 - Teacher Militancy
    - April, 1974 - Special Education
    - June, 1974 - Public Relations
    - September, 1974 - Conflict and Violence
    - November, 1974 - Sex Stereotyping

Appendix C

Organizations and Agencies Related to Education

AAUW	American Association of University Women
AAJC	American Association of Junior Colleges
AASA	American Association of School Administrators
ACCT	Association of Community College Trustees
ACE	American Council on Education
ACSA	Association of California School Administrators
ACSCP	Association of California State College Professors
AFT	American Federation of Teachers
ASBO	Association of School Business Officials
ASCCC	Academic Senate of California Community Colleges
BGCCC	Board of Governors of the California Community Colleges
CARE	California Agency for Research in Education
CASBO	California Association of School Business Officials
CASCR	California Association of Student Council Representatives
CCET	California Council on the Education of Teachers
CCHE	Coordinating Council for Higher Education
CCPT (PTA)	California Congress of Parents and Teachers
CCUFA	California College and University Faculty Association
CFT	California Federation of Teachers
CJCA	California Junior College Association
CJCFA	California Junior College Faculty Association
CRTA	California Retired Teachers Association
CSBA	California School Boards Association
CSEA	California School Employees Association (also California *State* Employees Association)
CSFSA	California School Food Service Association
CSHA	California School Health Association
CSNA	California School Nurses Association
CSSDA	California Small School Districts Association
CTA	California Teachers Association
CTPL	Commission for Teacher Preparation and Licensing
ECC	Educational Congress of California
FACCC	Faculty Association of California Community Colleges
LCC	League of California Cities
LWV	League of Women Voters
NEA	National Education Asociation
NSBA	National School Boards Association
SBE	State Board of Education

SDE	State Department of Education
STRS	State Teachers Retirement System
WASC	Western Association of Schools and Colleges

Appendix D

A partial list of motions requiring more than a majority vote of the board for passage is as follows:

- A resolution for the sale or lease of property — ⅔ vote (*Ed. Code* Sects. 16056 and 16152).
- A resolution to lease real property in which monthly rental is $50 or less — unanimous vote (*Ed. Code* Sect. 16059).
- Lease of property (note more than three months) with residence on it — ⅔ vote (*Ed. Code* Sect. 16070).
- A resolution to lease land for the production of gas — unanimous vote (*Ed. Code* Sect. 16102).
- A resolution to exchange real property — ⅔ vote (*Ed. Code* Sect. 16176).
- A resolution for the sale, lease, or exchange of property to other public agencies — unanimous (*Ed. Code* Sect. 16203).
- A resolution to dedicate or convey property for streets, utility easements, storm drains, ditches, etc. — ⅔ vote (*Ed. Code* Sect. 16252-16254).
- Exchange of property with adjacent owner to settle dispute — unanimous (*Ed. Code* Sect. 16352).
- A resolution to transfer money from the undistributed reserve to any expenditure classification — ⅔ vote (*Ed. Code* Sect. 20951).
- Render city or county zoning ordinance inapplicable — ⅔ vote (*Govt. Code* Sect. 53094).
- Temporary borrowing before receipt of income — ⅔ vote of members, approval of county auditor and treasurer (*Govt. Code* Sect. 53821(c)).
- Money borrowed July 15 — August 30 to be repaid from state apportionment — ⅘ vote (*Govt. Code* Sect. 53824).
- Exceeding the budget to meet national or local emergency created by war, military attack, sabotage, or to provide adequate defense — ⅘ vote (*Govt. Code* Sect. 53792).